OnePoint Human Capital Management

Software Release Notes

April 2019

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Release Information

This document contains detailed descriptions of release notes for the release date/month shown above, as well as explanations of resolved issues.

Supported Operating Systems and Browsers

The tables below show the operating systems and browsers currently supported.

Supported Desktop and Mobile Operating Systems

NOTE: The list shown in the table below are operating systems we support, though they may not be actively tested.

Platform	OS Version
Desktop	
Windows	7, 10
Mac	10.13.4 (High Sierra)
Mobile	
iOS	11.4.1 -> latest
Android	6.0.1-> latest

Supported Browsers for Desktop

Browser	Version
Internet Explorer	11
Microsoft	Edge
Google Chrome	latest
Mozilla Firefox	latest
Safari	latest

Cross Product Enhancements

Access Profiles: Allow Login Access Profile Functionality on Mobile App

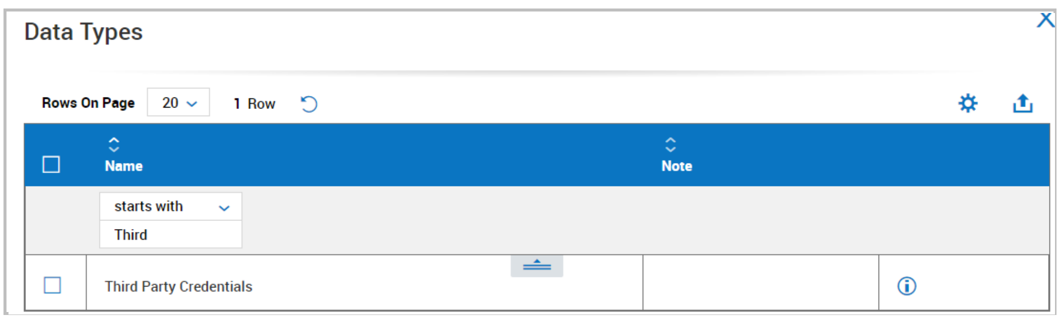
70012: Access Profiles now work correctly with the Mobile Application, and access is regulated only by the *Allow Mobile Access* checkbox in the profile.

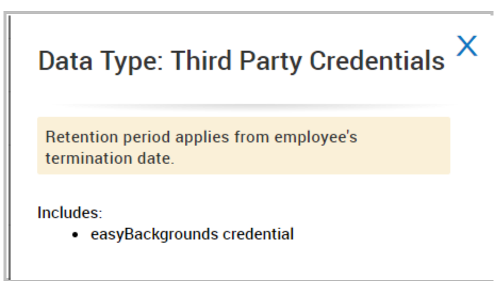
The system will first look to the Access Profile assigned in the Employee Information. If it is blank, the Access Policy designated in the employee's assigned Security Profile is applied. If neither one of these are specified, the Access Policy from the Company Edit screen is used.

If a user logs in via a mobile browser, then the IP is checked.

Data Retention: Third Party Credentials Data Type

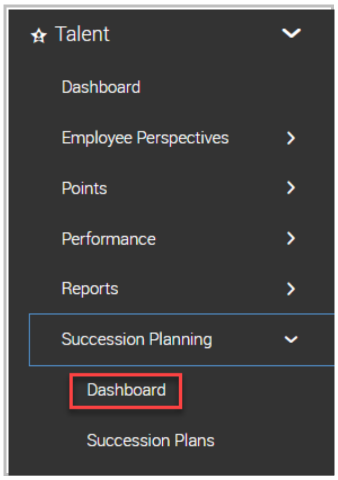
97907: A new Data Type, *Third Party Credentials*, is now available and can be added to the Data Retention policies. This Data Type includes easyBackgrounds credentials.

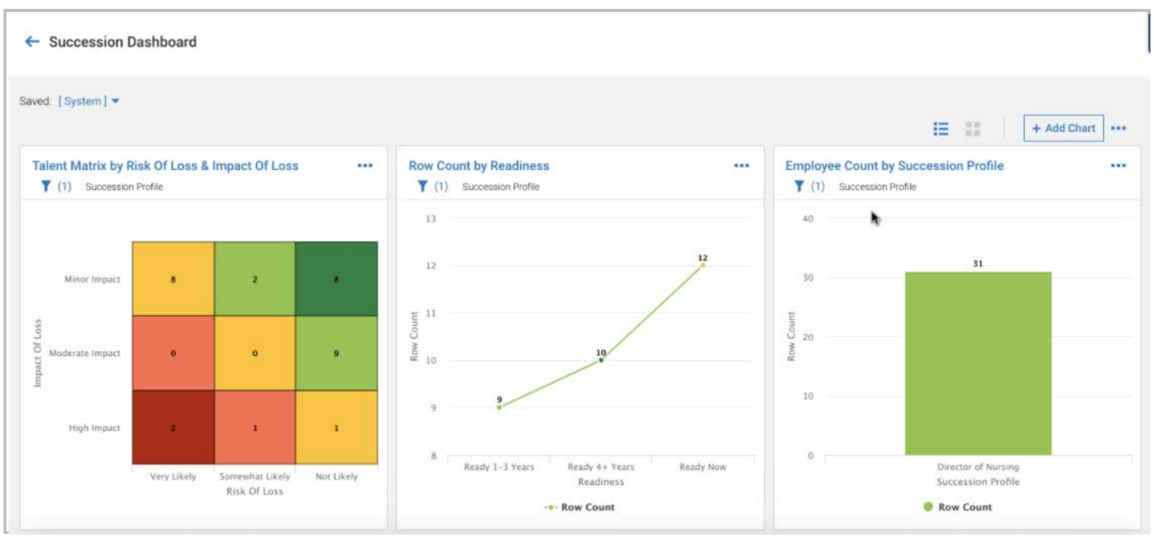




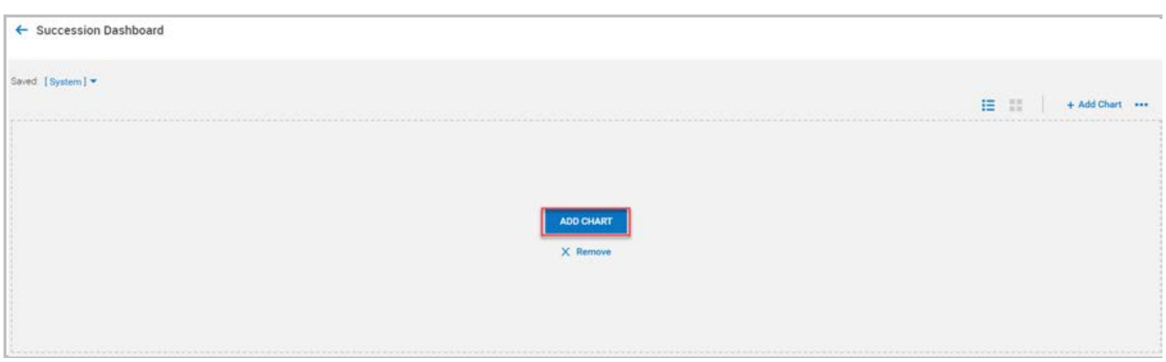
Dashboards: Succession Planning Dashboard in New UI

97966: A new sub-menu has been added underneath Succession Planning (*Team > Talent > Succession Planning*) in the new UI environment that features *Dashboard* and *Succession Plans*. The *Dashboard* menu item sends the user to a Succession Dashboard that allows the user to bring in their succession visuals.





NOTE: By default, this is a blank screen with a placeholder chart frame that features an *Add Chart* option like the other Visualization Dashboards.

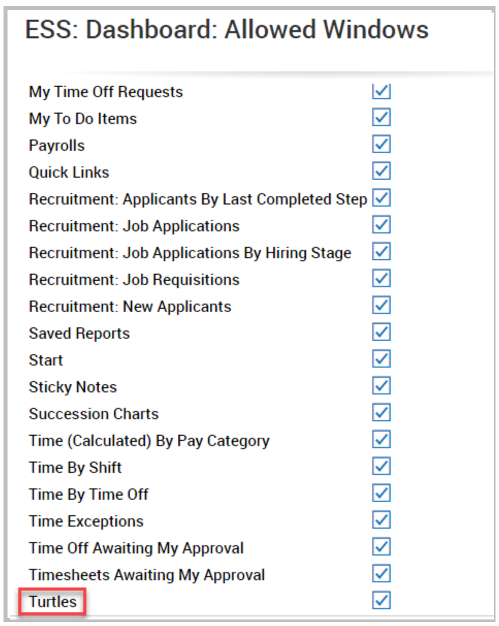


Module Dashboards: Defaults in Security Profiles

100446: Default settings for module dashboards can be set in the Security Items widget of security profiles. In Employee and Applicant profiles, the dashboards are disabled by default. For any other security profiles, the default is On. Security profiles with items intended for use by managers will have the module dashboards enabled by default.

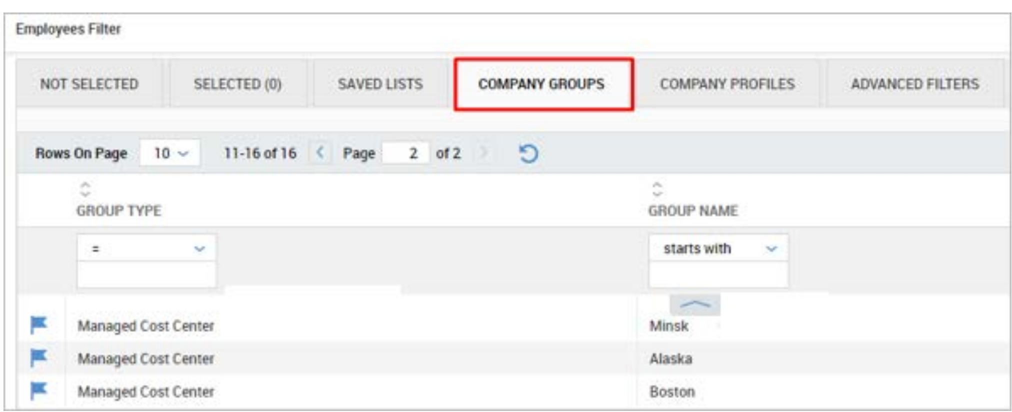
Employee Profile: Turtles Widget Moved

94471: The Turtles widget has been moved from the Employee Profile first screen to the home Dashboard page. Visibility of this widget is controlled within the New UI Dashboard Layout Configuration and the corresponding security item in the assigned Security Profile (*ESS* tab > *Dashboard* section > *Allowed Windows* set to *Custom* > *Permissions* > *Turtles*).



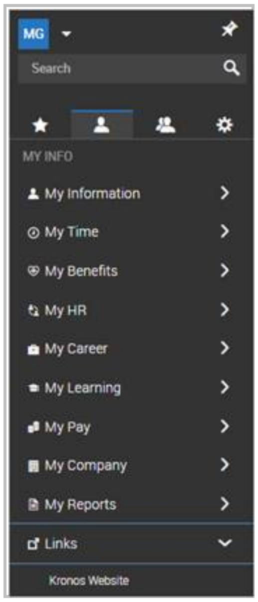
Employees Filter: Managed Cost Center (MCC) Groups Added to Filter

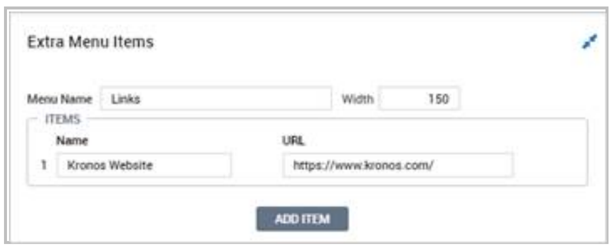
86289: In the system, anywhere employees can be selected via an Employees Filter, Managed Cost Centers can now be selected under the *Company Groups* tab.



External Links Menu: External Links Now Supported in New UI

93098: The (external) ***Links*** menu item in the New UI, located under the *My Info* menu (within the Employee Self Service menu), will now support the use of externally linked URLs. The URLs are set in the *Extra Menu Items* widget of security profiles. Once defined, the external links will become active for the users assigned to the security profile. This is available in the New UI Desktop, Classic UI, and Mobile App environments.



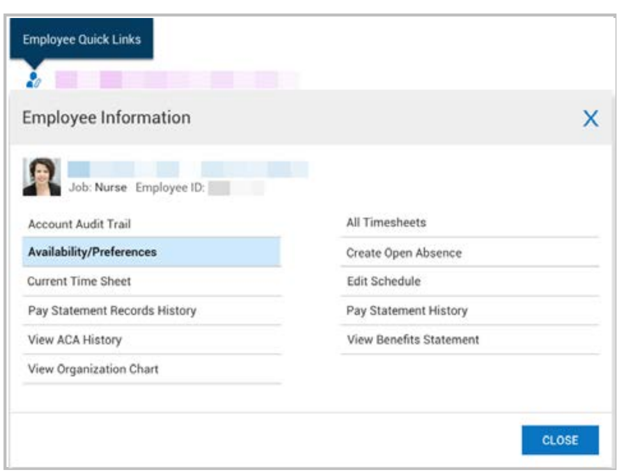


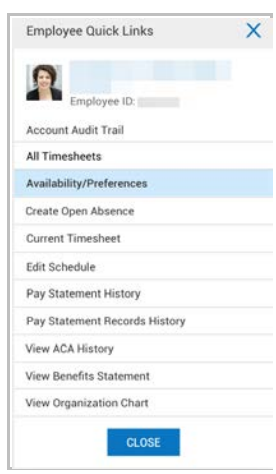
A new browser window opens for the links within all environments ((Desktop - New UI and Classic) and Mobile App).

Global: Employee Quick Links in New UI and Mobile

95946: Employee Quick Links are now supported throughout the application within the new UI Desktop environment and the Mobile App. Some examples are the Account Audit Trail, All Timesheets, Pay Statement History, and Pay Statement Records History. The Quick Links will display based upon the user's assigned security settings.

NOTE: In the mobile app, pages that have not been converted to the mobile-friendly experience will not be displayed.



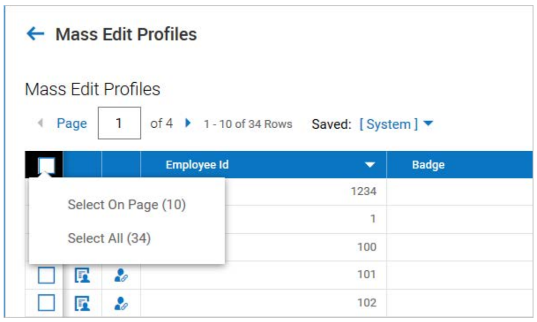


Mass Edit: Select All in New UI

101483: Reports used for mass-editing may span multiple report pages. In the New UI Desktop experience, the *Select All* option enables users to apply the edits to data that would appear on all pages of the report, whether currently displayed or not. As an alternative, the *Select On Page* option will apply the edits to only the rows shown on the current page.

If column filters, date filters, and/or employee filters are enabled in a report and *Select All* is used, it will only select the checkboxes for rows that remain in the report across all pages. Rows excluded from the report due to enabled filtering are not selected.

An example is shown below for editing employee profiles, under *ADMIN > Company Settings > Mass Edit > Mass Edit Profiles*. Similar options are available for all mass edits in the New UI Desktop experience.

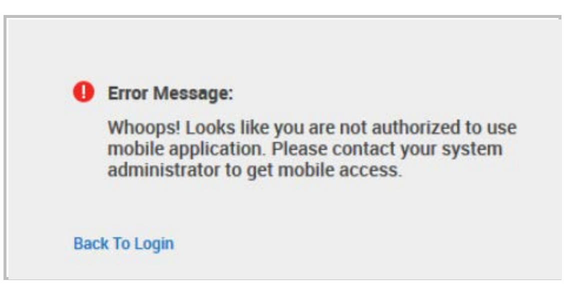


Mobile Application: Connection Lost Message

76775: The mobile application now displays the message *Your internet connection is lost. Please check your network settings* when a user's connection is lost. This notification will pop up when there is no network, the server is not available, or a VPN connection is lost.

Mobile Application: User Non-Access Message

99413: When a user who is assigned a Security Profile that does not have the option for **Enable Mobile** selected attempts to login to the Mobile App, the user is now re-directed to a new page with an updated error message that reads: *Whoops! Looks like you are not authorized to use mobile application. Please contact your system administrator to get mobile access*.



Mobile Application: Mobile Offline Localization

96800: When utilizing the mobile application, offline localization now uses the appropriate language in the labels for the messages on mobile devices. Initially upon the first successful login, the device's locale is used. After the first successful login, the company's locale is saved and used. The priority of the locale to be used is as follows:

- The user configured language, where available.
- The device language, if it is supported by the mobile app.
- English is used as the default/fallback language.

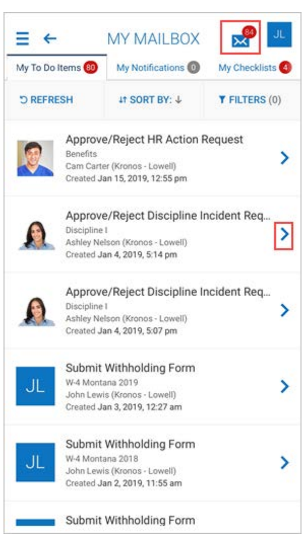
This priority applies to the translations of all hybrid (mobile pages not written to be exclusively for mobile) screens, Touch ID/Face ID errors on the login screen, and the Touch ID authentications dialog on Android.

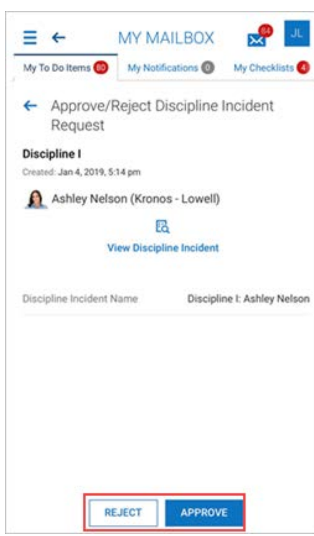
For the permission messages, only the device locale can be used as it is driven by the system itself.

NOTE: Permissions on Androids and IOS use device language only. Additionally, for the languages that are not supported, details messages are in English, whereas the title and buttons use the device language.

My Mailbox: ToDo Items Support in New Mobile App

88220: The completion of tasks assigned to users in workflows has been simplified for users of the New Mobile App. Those users now have access to a growing set of To Do Items from the *My Mailbox* page. Pages containing the links to additional information, forms or buttons that can be used to complete tasks can be accessed directly from the list on the *My To Do Items* tab on the My Mailbox page.





Approve and *Reject* buttons often appear in the To Do item details, enabling users to approve an item assigned to them in just two steps.

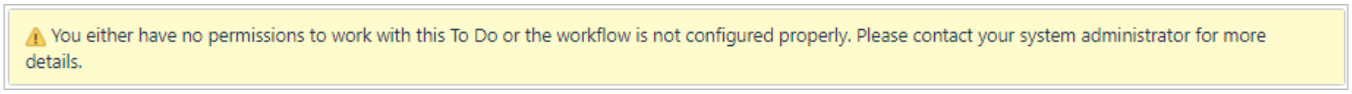
The types of To Do items that are supported on the *My To Do* tab are listed in the table below.

Workflow Type	To Do Type(s)	Release
Incident Types	Approver Sign Close Incident Employee Sign Approve / Reject Collect Note	February, 2019
Job Requisition	Approve/Reject	February, 2019
Questionnaire	Display Message Question	February, 2019
Hiring Stage Change Request	Initiate HR Action	February, 2019
HR Action Request	Initiate HR Action Collect Note	February, 2019
Leave Of Absence Requests	Collect Note	February, 2019
Timesheet Request	Collect Note	February, 2019
Overtime Request	Activate Contract	February, 2019
Time Off Request	Activate Contract Collect Note	February, 2019
Virtual Code: Account Approval	Approve / Reject	February, 2019
HR Action Request	Approve/Reject Initiate HR Action Terminate	October, 2018
System Defined Workflow*	Form W4	December, 2018
System Defined Workflow*	Form I9	December, 2018
Timesheet Change Request	Approve / Reject Timesheet Change Request	2018

*A system-defined workflow will automatically trigger the creation of the To Do item following a user's action. For example, following creation of the form the ToDo item for completion of the form is created.

To Do Items: Warning Message Added to Users in New UI

95437: In the New UI, a new warning message has been added to To Do Items and will display to users who either don't have the proper permissions to work with the To Do Item, or to inform the user if the workflow configuration is incorrect.

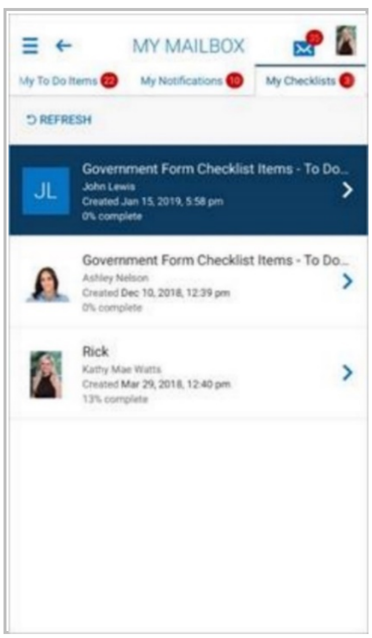


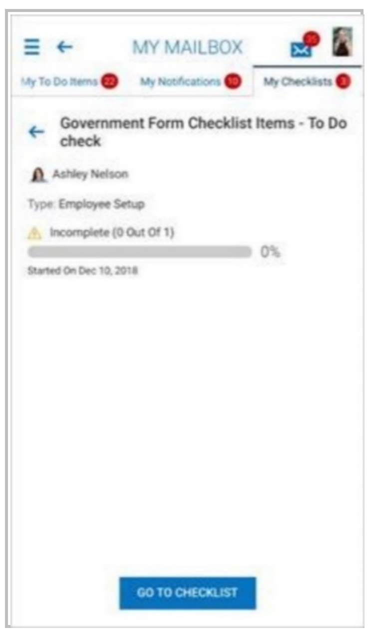
My Mailbox: My Checklists Tab Added to Mailbox in New UI Mobile

96131: Within the New UI Mobile experience, a ***My Checklists*** tab has been added to users' *My Mailbox* page. This tab will automatically add any checklist items requiring the employee's attention. A number will display indicating how many items are under the tab.

Users can view the item in their list and then select the *Go To Checklist* button to open the checklist and view and/or edit the checklist details.

A security setting will control user access to the tab. Within the *Tools & Documents* section of the *ESS* tab of security profiles, check the ***My Checklists (Mailbox)*** setting to enable the tab and access.



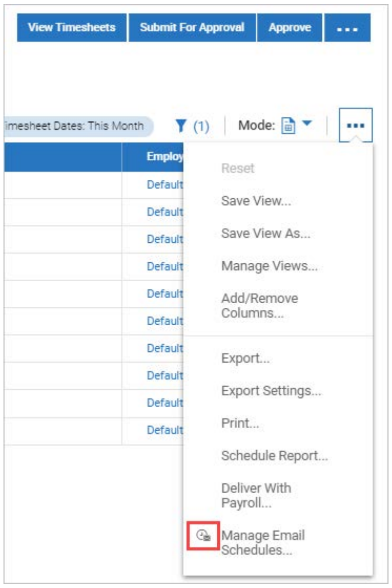


Reports

The following enhancement have been completed for reports.

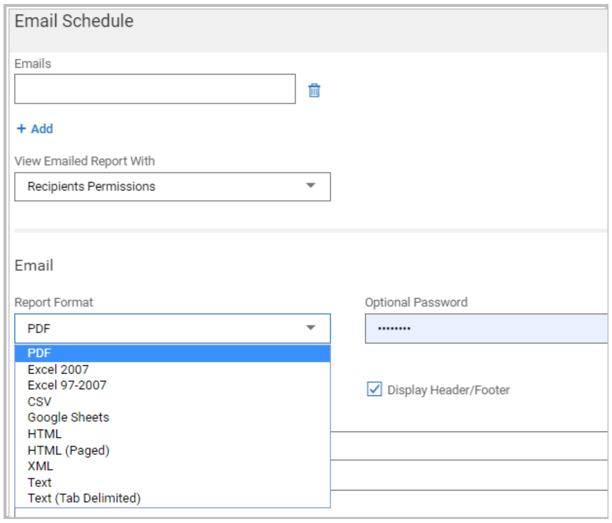
Manage Email Schedules: Schedule Icon Added to Manage Email Schedules in New UI

94409: In the New UI, after adding an email schedule to a saved report, if there are one or more schedules assigned, an email schedule icon will display next to the *Manage Email Schedules* option, under the triple dot icon for that report. When this icon is present, users will know that an email schedule exists. Note that the saved report is located under *My Info > My Reports > My Saved Reports*; and the saved report must be opened or run to access the options under the triple dot icon to manage the saved view.



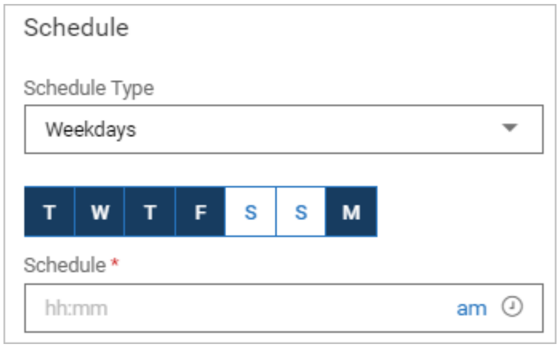
Manage Email Schedules: PDF Set as Default for Emailed Reports in New UI

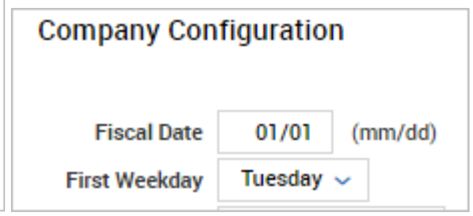
94739: In the New UI, when setting an email schedule for a saved report, the email report format previously defaulted to HTML, and will now default to PDF. Other commonly used formats are now towards the top of the drop-down menu.



Manage Email Schedules: First Day of Week Based on Company Setting in New UI

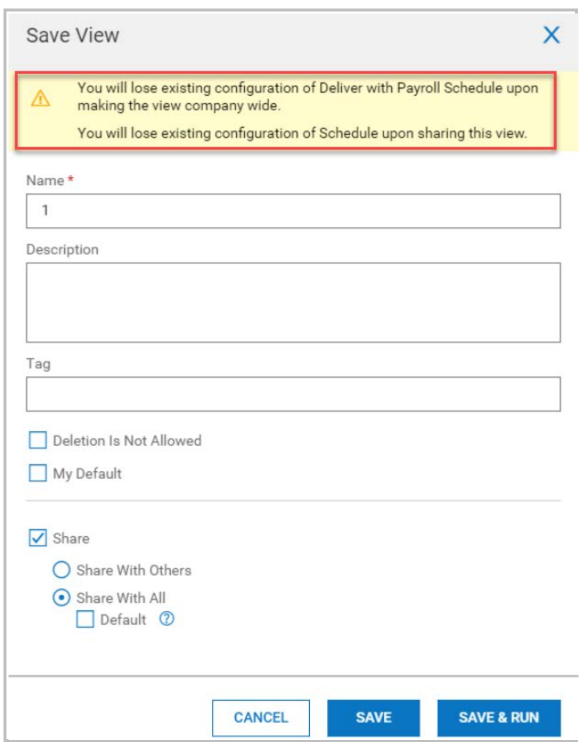
94738: In the New UI, when setting an email schedule for a saved report, the first day of the week and subsequent pattern in the *Schedule* section will be based on the *First Weekday* setting in *Company Setup*.





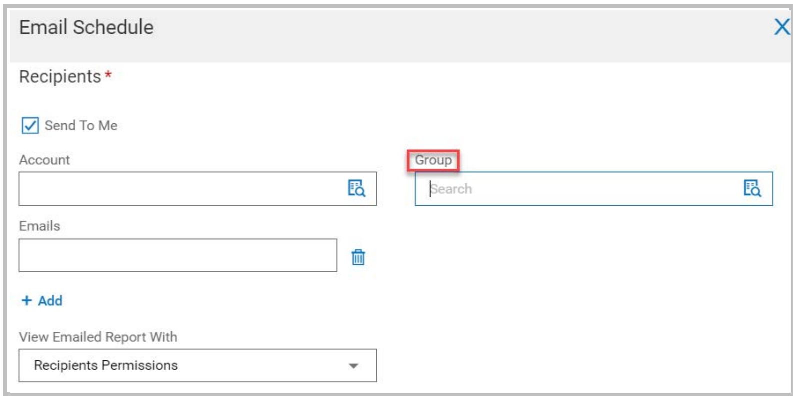
View Warning Message when Deliver With Payroll or Schedule This Report is Enabled

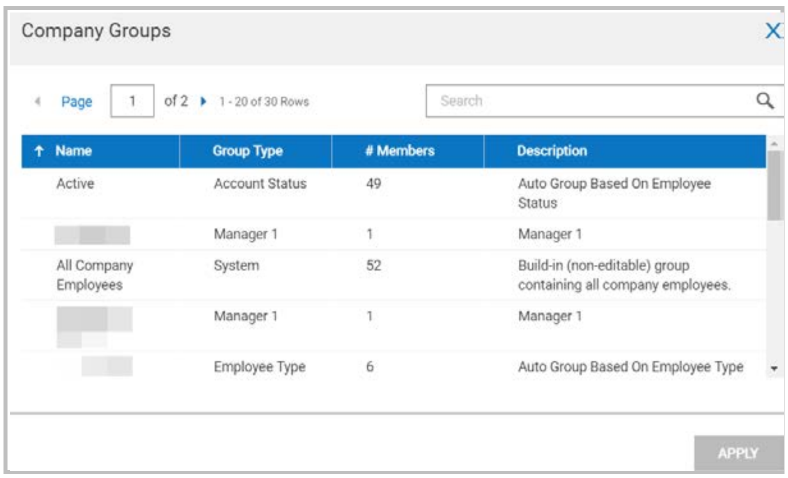
96592: When users update the view of a report with the *Deliver With Payroll* and/or *Schedule This Report* option(s) enabled from a personal setting to one visible by others, a warning message is now displayed. The new message explains that the configuration of the Deliver with Payroll and Schedule will be lost upon making the view company wide.



Email Reports to an Employee Group as Recipients

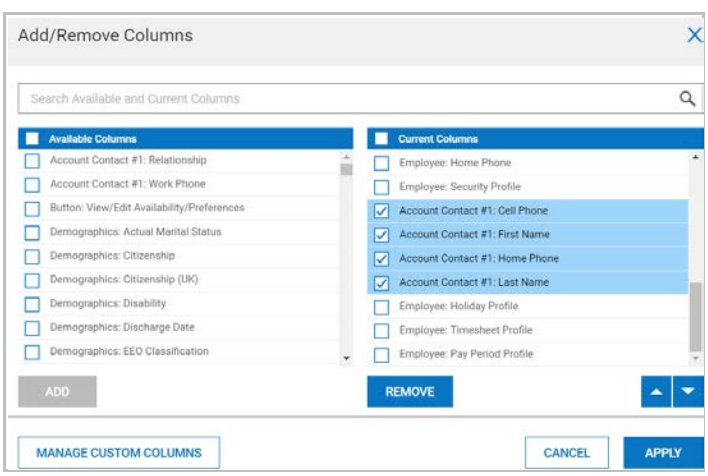
96067: When setting up a schedule by which to email a report, users can now select an established group of employees as the recipient(s) using the ***Group*** setting.





Highlight and Checkboxes for Added Columns

95065: When users select new columns to add to a report view, the columns can be located (via highlighting) and moved without the need to select the column checkboxes again within the Add/Remove Columns popup.

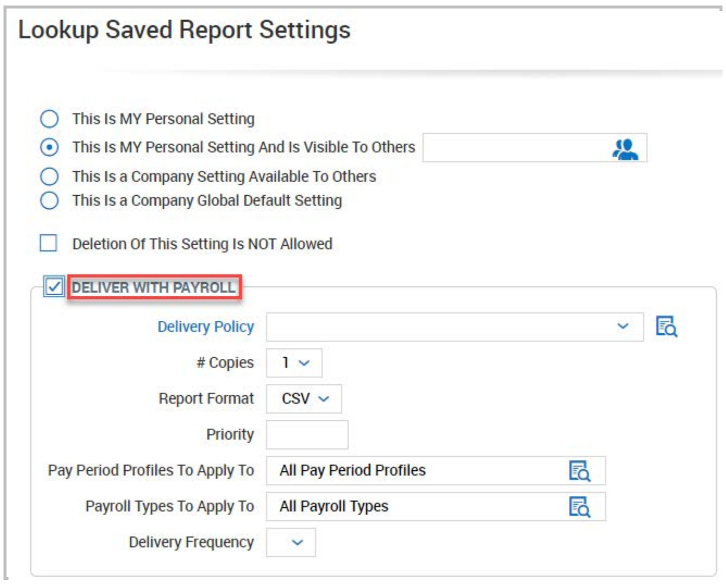


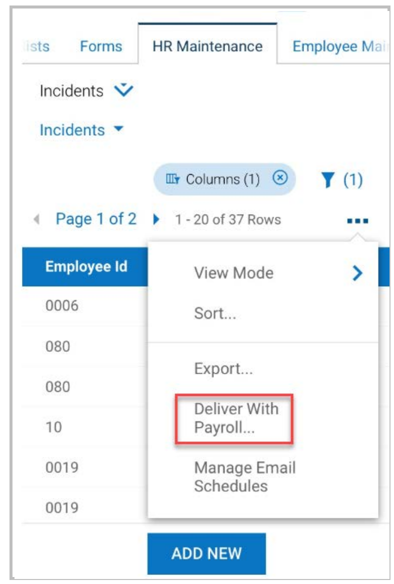
Reports Opened via Charts on Dashboard

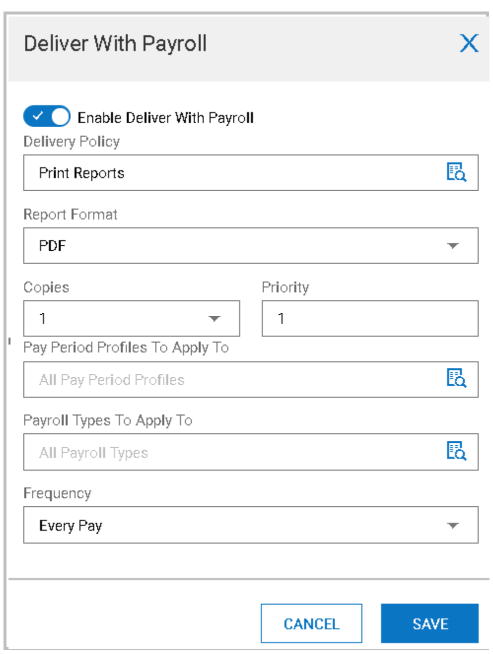
89664: When a user is in a Dashboard and clicks inside a chart to navigate to a report that already has filters applied, when the user navigates away from the report, the user is **not** receiving a prompt to save changes when no actual changes were made. If a user is in a report and makes changes such as utilizing the filter panel to filter the report, the user **does** receive the prompt to save changes as expected.

Deliver With Payroll Option on Reports in New UI and Mobile

94253: The *Deliver With Payroll* option is now available and editable on the Personal and Personal Shared views of reports in the new UI Desktop Experience and the Mobile App. On System and Company views, the *Deliver With Payroll* option is present, but not editable.

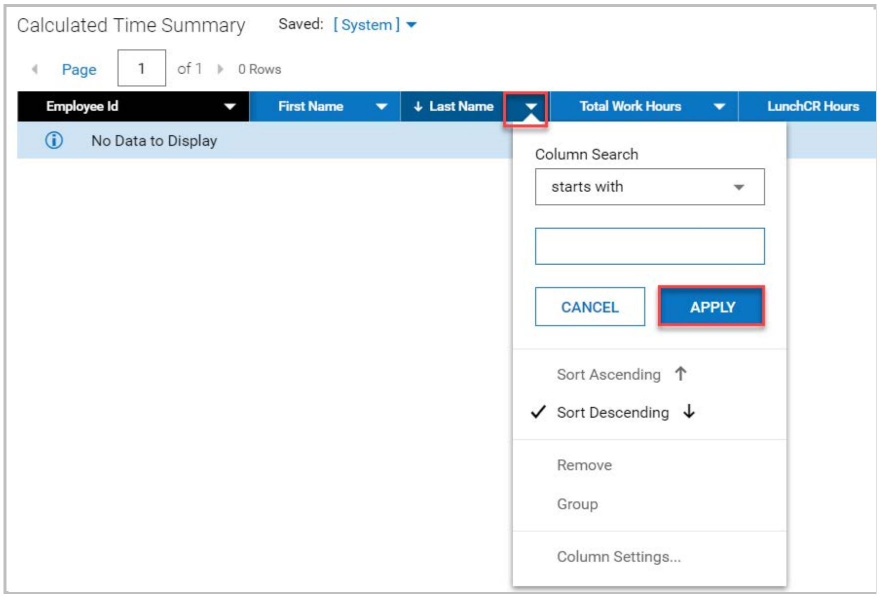




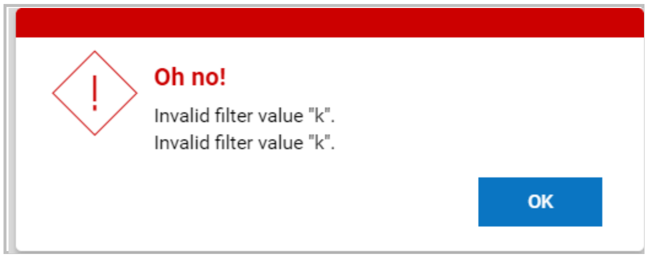


Column Filtering in Reports

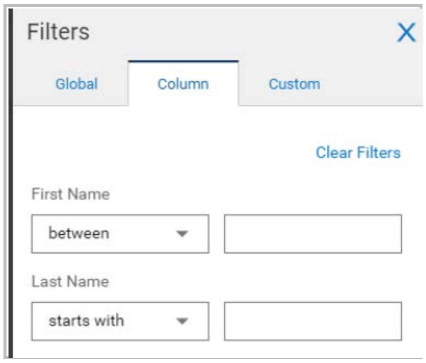
64181: Users can now filter by a column upon selecting the down arrow for the column actions, which is constantly visible, to the right of the column name. Users can apply a filter by clicking the *Apply* button or hitting Enter after typing in the value to filter by. When the filter is applied, the report is refreshed and displays records that meet the filter criteria from the whole report and not just a single page.



If a user enters an invalid filter value, an error message displays upon clicking *Apply* which highlights the invalid value.

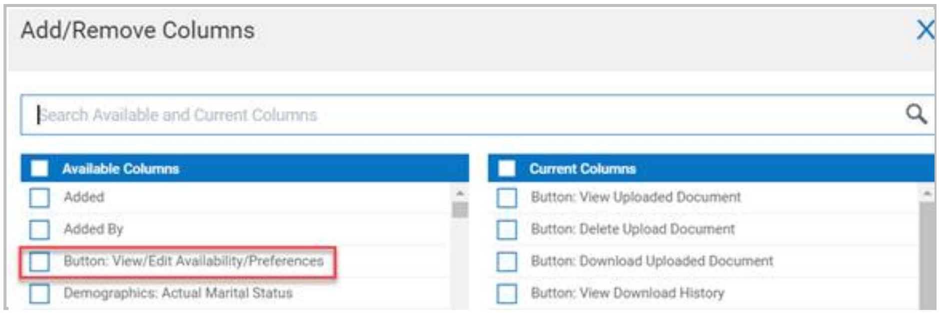


On mobile devices, users search by column using the global filter panel.



Column for View/Edit Availability/Preferences Button

96199: A column for the button to *View/Edit Availability/Preferences* is now available for inclusion in reports such as Employee Documents, Incidents, and Vehicles. When users click on the Availability/Preferences button, they are redirected to the Availability/Preferences page.

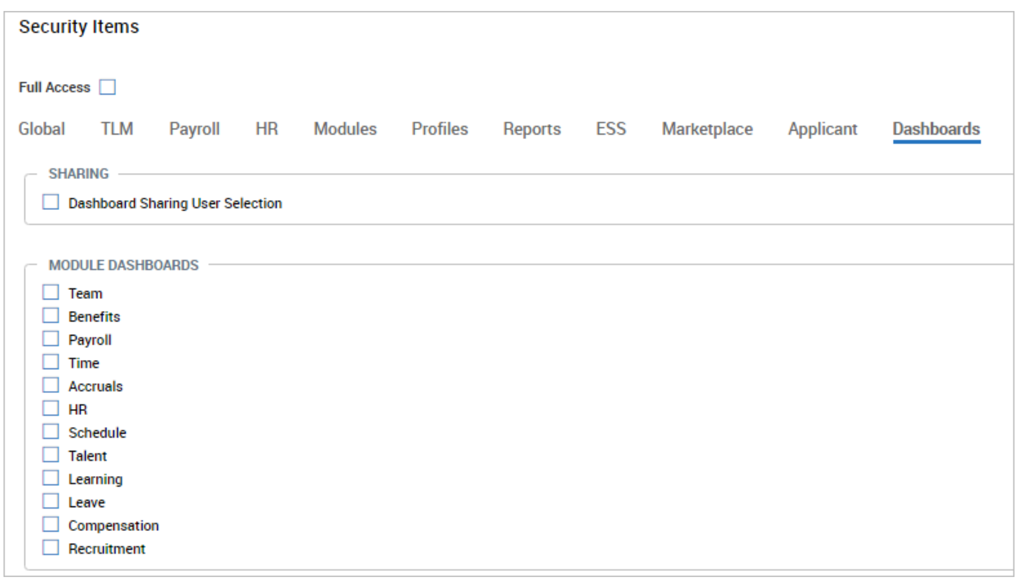


NOTE: This enhancement is applicable in both the Classic UI and New UI environments.

Security: Settings Added for Access to Dashboards in New UI

77839: A new set of security settings have been added to control user access to dashboards in the New UI. These new settings are contained within their own ***Dashboards*** tab within security profiles, under *Company Settings > Profiles/Policies > Security*.

- Under the *Sharing* section, an option is available to allow users to share their dashboards with other users.
- Under the *Module Dashboards* section, multiple settings are available to control access to the module dashboards in use in your company.



REST APIs

This section contains information and enhancements for REST API webservices.

REST API Deprecation

There are no APIs scheduled for deprecation at this time.

New/Edited APIs

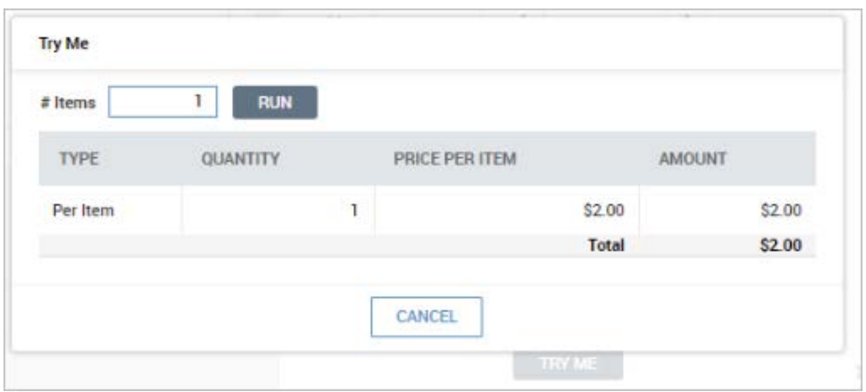
Employee Change API

94727, 94728, 94729: The Employee Change API will now recognize changes in employee compensation. The **rest/v2/companies/{cid}/employees/changed** API will update the Base Compensation widget, the new Additional Compensation widget and the new Total Compensation widget in employee accounts.

Billing: Auto Increase Schedules & Try Me Added

89770: Within the *Constraints* widget, a new ***Try Me*** button allows you to test the schedule prior to applying it. When clicking the button, a pop-up will display for entering the invoice date (default is the current date) and will contain a *Run* button. Clicking the *Run* button will first calculate the effective price based on the active auto-increase setting and then apply the auto-increase on the amount on that date.

Flat Amount for Custom Calculation (if enabled) will be taken into consideration, otherwise, the Flat Amount for Service will be used for calculating the auto-increase.

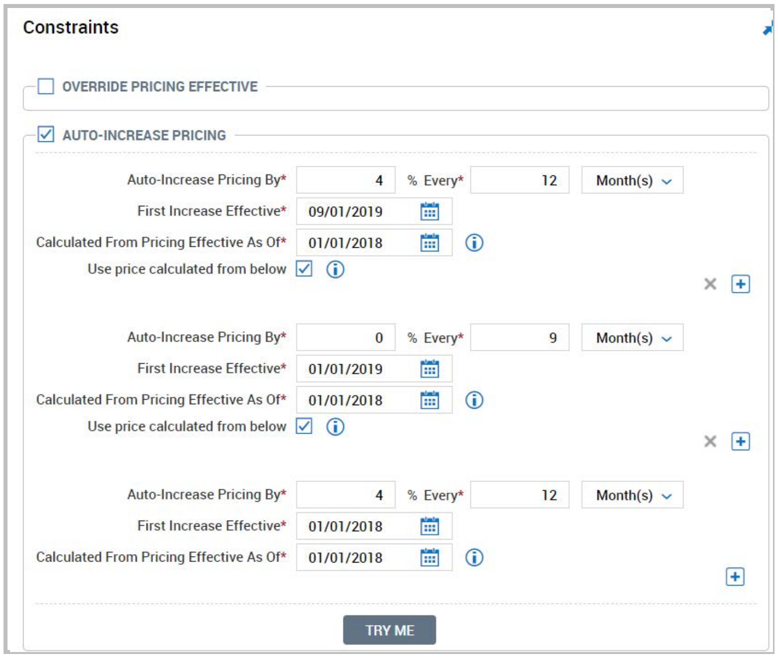


Billing: Variable Auto-Increase Schedules Compound Functionality

89768, 86073: To more effectively handle orders that require frequent changes in the increase percent and/or frequency, the ability to configure various Auto-Increase percentages and schedules with effective dates, as well as a compounding capability, has been added to the system. Users can configure the Auto-Increase percentages using the *Auto-Increase Pricing* option in the Constraints section within the Edit Invoice Generator Service screen. This functionality can be used in multiple scenarios such as skipping an increase while maintaining an inflated price or for contract negotiations.

As an example, if the base per item rate is $10, on the first increase effective date of 1/1/2018 (as shown in the screen shot below), the first increase of 4% is applied, making the new per item rate $10.40. The frequency for the first tier is twelve months, so on the effective date of 1/1/2019 for the second-tier increase, a new increase of 0% is applied. When the *Use price calculated from below* is checked in the second tier (as in the screen shot below), the $10.40 per item rate and the new increase of 0% keeps the price at $10.40. For the third tier, the new increase of 4% is set to be applied on 9/1/2019 and *Use the price calculated from below* is selected. When the 4% increase is applied to the $10.40 rate, the new rate is $10.816 effective 9/1/2019.

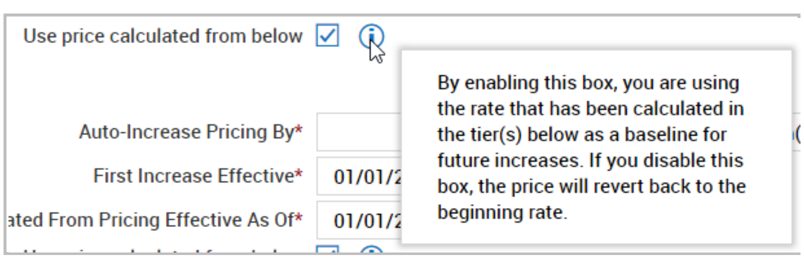
If the option to *Use the price calculated from below on the last tier* is **not** selected, the system reverts to the $10 per item rate and applies the increase of 4%, making the rate $10.40 again.



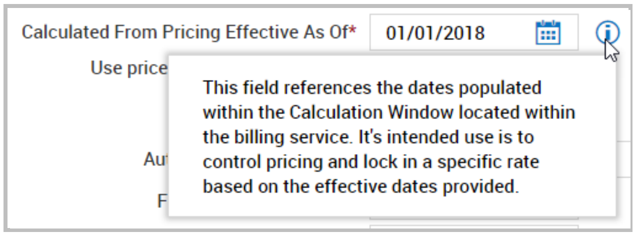
The ability to enter a 0% increase allows users to utilize the pricing tiers in the Billing Service with the *Calculated Price Effective From* field without having to add an increase percentage. It also allows price flexibility as it relates to auto-increase capabilities.

When the *Use price calculated from below* box is checked, the system will pull the price from the section below. When there is only one tier, a checkbox is not needed and does not display. Once another tier is added, the bottom tier does not have a checkbox because there is no price below it.

The tooltip for the *Use price calculated from below* box explains that *By enabling this box, you are using the rate that has been calculated in the tier(s) below as a baseline for future increases. If you disable this box, the price will revert back to the beginning rate.*



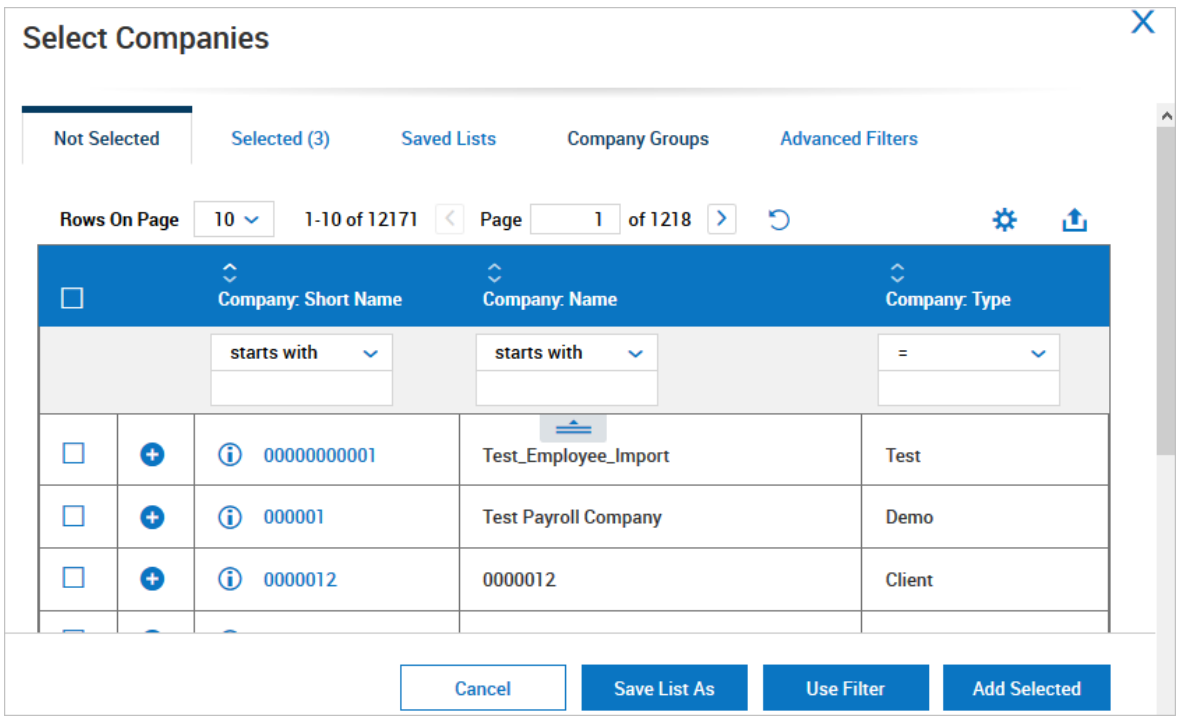
The *Calculated From Pricing Effective As Of* date references the dates populated in the Calculation Window within the Billing Service as explained by the corresponding tooltip.



Overlapping dates are not allowed and the standard errors/warnings will display.

Pop Up Communicator: Add Company Selector to Filtering Option

96742: To target announcements to specific companies from the *Pop Up Communicator*, filtering options were added in the December release. At that time, the company selection options were limited to only companies displayed on a single page, with a maximum of 200 companies. In this release, the *Specific Companies* filtering options have been enhanced and allow users to select one or many companies (with no max) as well as utilize saved lists, company groups and advanced filters. With this enhancement, users can target any audience they need.

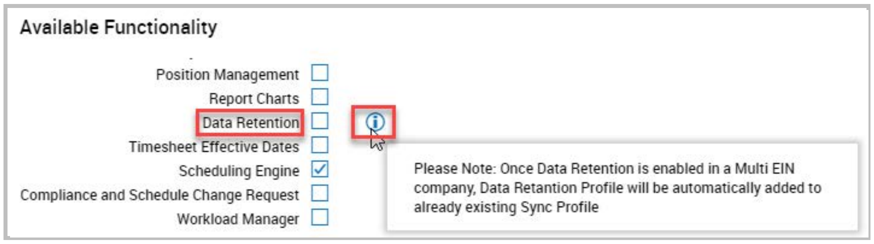


Data Retention

The following enhancements have been made to the Data Retention (GDPR) functionality.

Data Retention Functionality in Multi-EIN Companies

102830: To support Data Retention in Multi-EIN companies, users can now enable Data Retention (GDPR) for Multi-EIN companies just as they can for a single EIN company via the *Data Retention* checkbox in Available Functionality, Mass Edit, or the Company Information import.



Employees in Multi-EIN companies are processed in accordance with the assigned Data Retention profiles and included Policies. The *Company Functionality Enabled: Data Retention* column displays the correct state of the functionality.

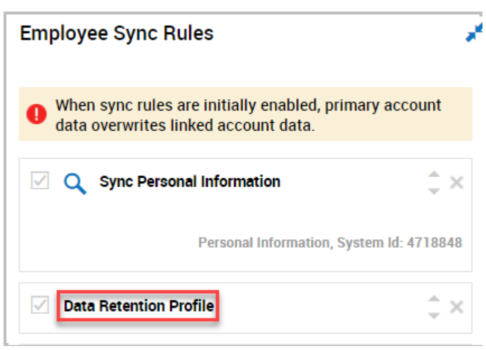
Use Primary Account Retention Profile for Multi-EIN

74292: To support Data Retention in a Multi-EIN environment, the system will now only recognize the Data Retention profile assigned to the Primary EIN account as the Data Retention profile for all accounts for the employee. The Termination Date of the Primary EIN record is now the trigger point for all account records for the employee, so all linked accounts are cleared at the same time based on the Primary EIN Termination Date.

If the Primary EIN account is not terminated, no secondary EIN account data is cleared, even if the account is terminated or deleted.

Data Retention Profile Added to Employee Sync Profile

74427: The Data Retention profile has been added as a default component of the Personal Information rule within the Employee Sync Profile. The Data Retention Profile is a separate item enabled by default in the sync profile.



When both Data Retention and Multi-EIN are enabled for a company, the Data Retention Profile is automatically added to existing Employee Sync Profiles.

Newly Hired Account is Primary if Added to a Terminated Group for Multi-EIN

107954: When all associated account records in a group are terminated, the group can be cleared per the specifications in the Data Retention profile assigned to the Primary EIN account. It is now possible to add a new account to such a group, which will be added as a non-primary EIN record.

If a new account record is added manually, via Employee Import, or via an HR action, it will become the Primary account in the group, and the group will not be cleared until the Primary account is terminated.

Reports

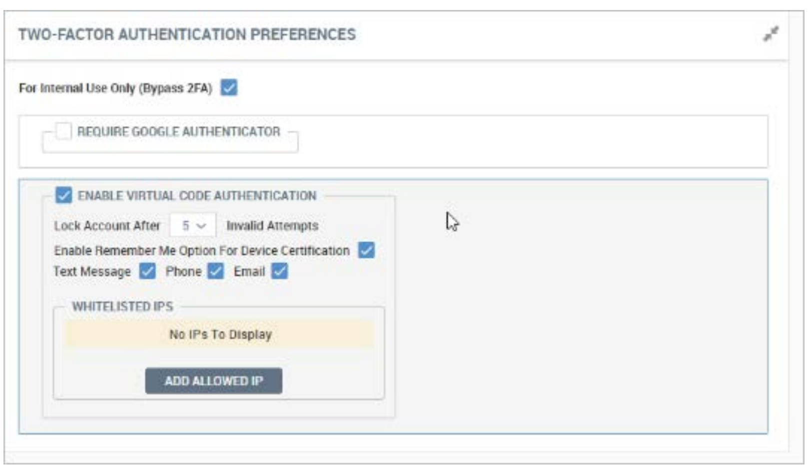
Source Type Field Added to Global Access Report (All Interfaces)

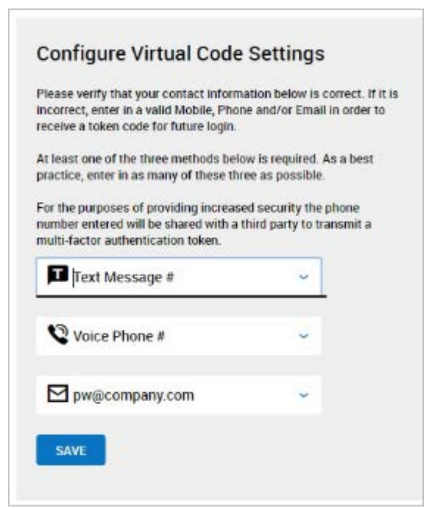
97344: To facilitate tracking and monitoring of mobile app usage, a new field has been added to the Global Access report. The *Source Type* field in the report can be optionally added to the report to display how the user logged into the application, and will be populated with one of the following: *NEW_UI_MOBILE_APP, NEW_UI_MOBILE_BROWSER, NEW_UI_BROWSER, HCM_MOBILE_BROWSER, HCM_BROWSER, CLASSIC_BROWSER, CLASSIC_MOBILE_BROWSER, CLASSIC_MOBILE_APP.*

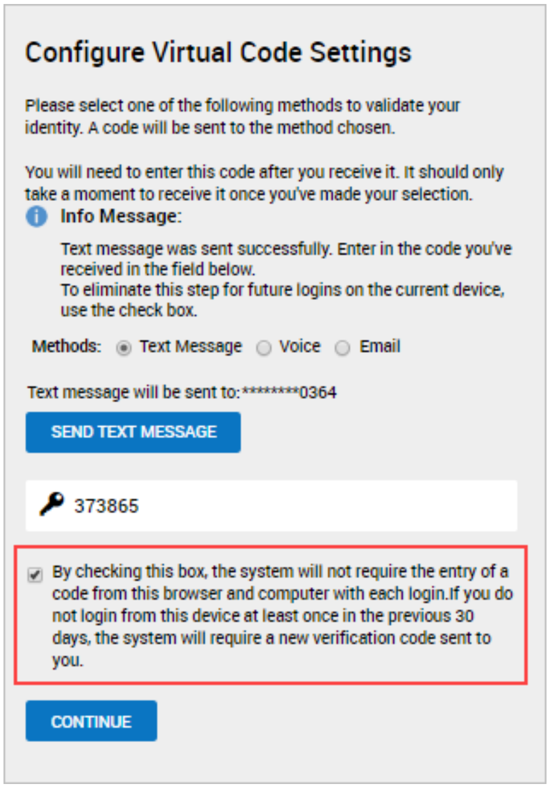
User Authentication Settings

Codes Cleared When Remember Device is Set

87218: When an administrator clears the virtual code settings for an employee from Employee Information, the employee will be required to configure their virtual code settings and log in again. This is true even if the employee had checked *the option to remember the device* when initially configuring their virtual code settings. Once the virtual code settings have been re-configured, the employee will again have the opportunity to check the option to remember the device.

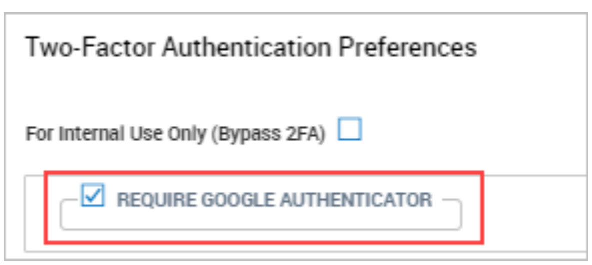


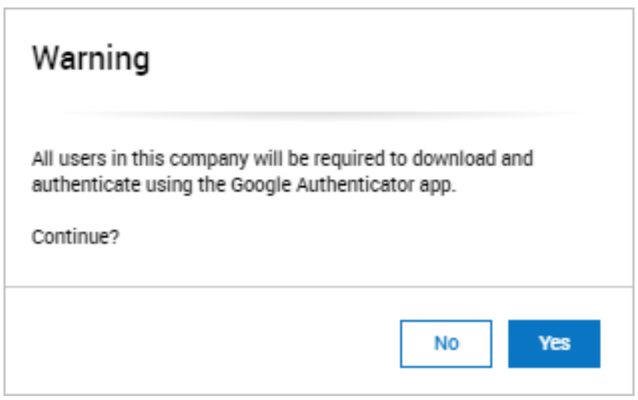




Require Google Authenticator

72471: When the *REQUIRE GOOGLE AUTHENTICATION* option is checked on the Company Information page, all users at the company are required to download and authenticate using the Google Authenticator app. A message will be displayed as reminder after checking the *REQUIRE GOOGLE AUTHENTICATOR* checkbox in the *Two-Factor Authentication Preferences* widget.

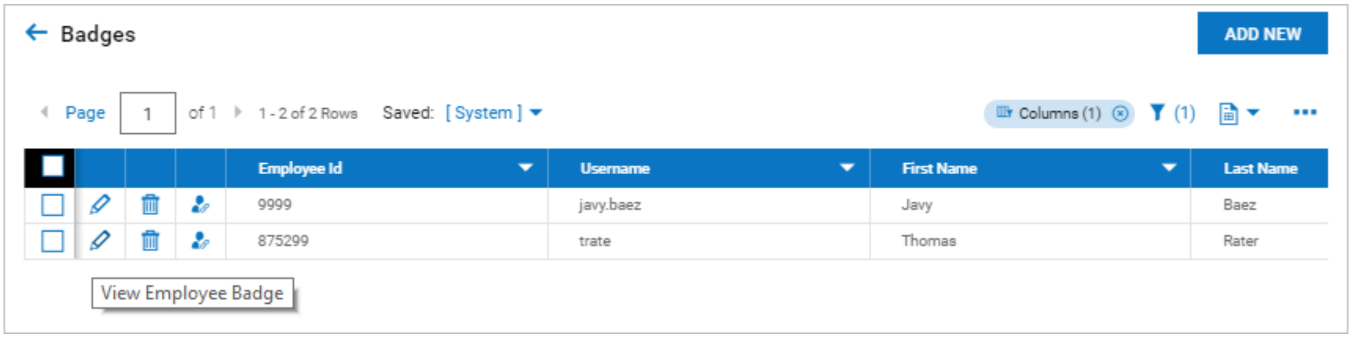


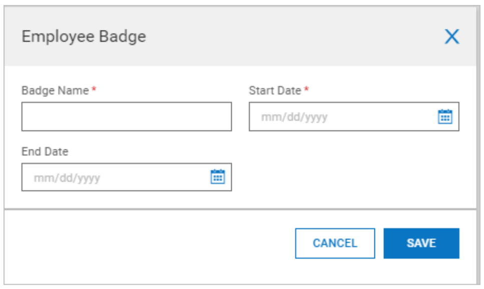


Badge and My Delegation Pages (New UI Desktop and New Mobile App)

104098, 104113, 105473: To simplify the process of adding or editing badges and workflow delegations, the pages have been updated. Users with appropriate permissions can view a single page which shows all badges or all workflow delegations and then select a single employee and fill out the required information in pop-ups to complete the action.

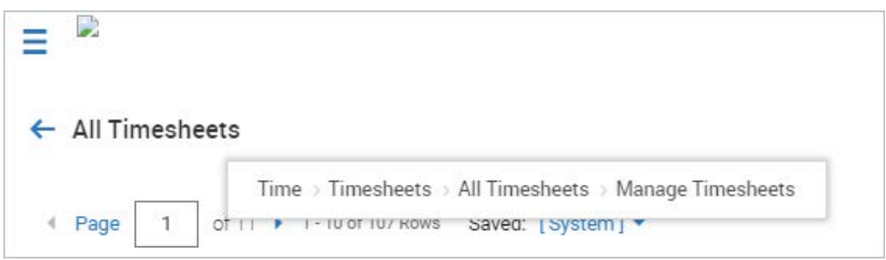
NOTE: Although the badges page shows multiple employees available for selection, only one badge can be added or updated at a time. The multi-selection options will be removed in a future release.



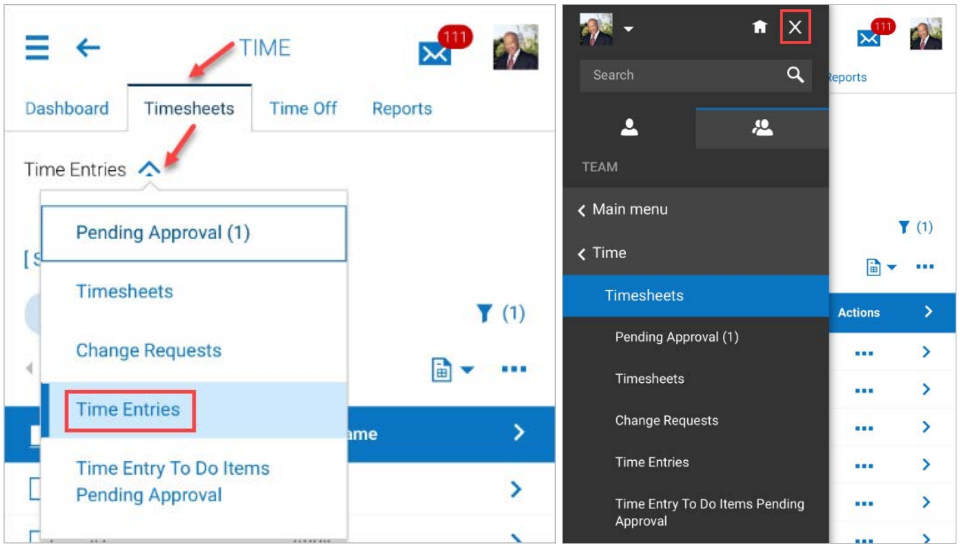


Breadcrumb Menu Path Added to New UI (Desktop)

99412: We have now provided menu navigation information to the page titles, known as breadcrumbs. This is available in the New UI Desktop experience. You can now hover your mouse over the page title and the navigation path will pop up and display the path. This will be available from menus within the hamburger menu, including *Favorites* (star icon), *My Info* (single employee icon), *Team* (double employee icon), and *Admin* (gear icon).



As a reminder to those using the Mobile experience, your menu path can be easily verified by using the drop-down (double chevron icon) on the current page. Plus, you can tap and activate the hamburger menu to verify your menu path. Once activated, you can either swipe to remove it, or tap the X and your current page will be preserved.



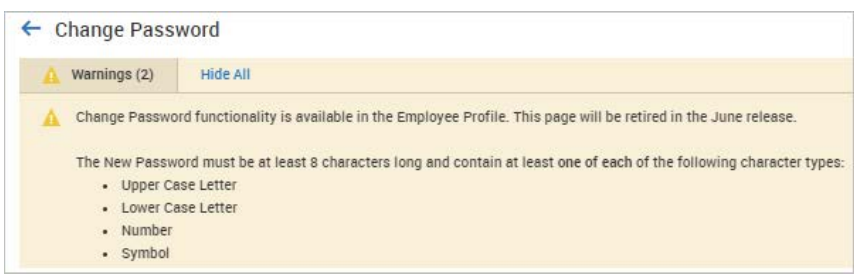
Deprecation Message Added to Account Settings & Manual Actions (Desktop)

106386: In the desktop version of the New UI, we have added messages to *Account Settings* and *Manual Actions* to inform Admins and managers that these settings are available in the Employee Profile and will be retired in the June system release.

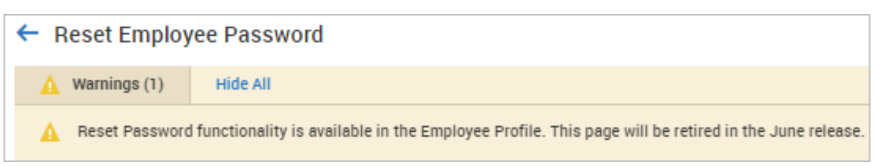
Account Settings

Team > HR > Employee Maintenance > Account Settings

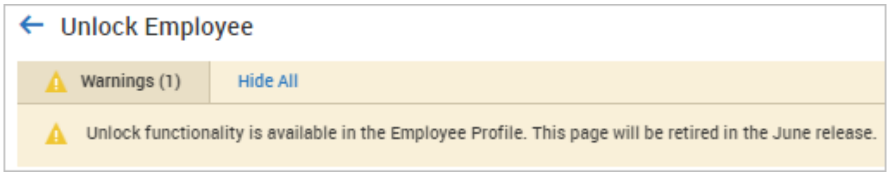
- **Change Password**



- **Reset Password**



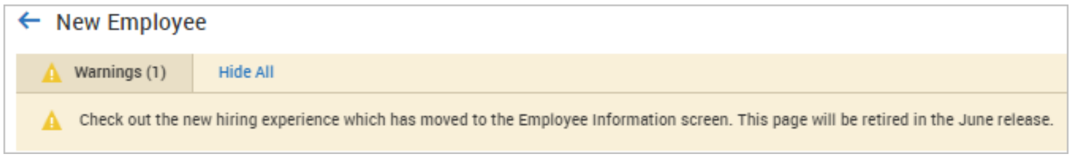
- **Unlock Account**



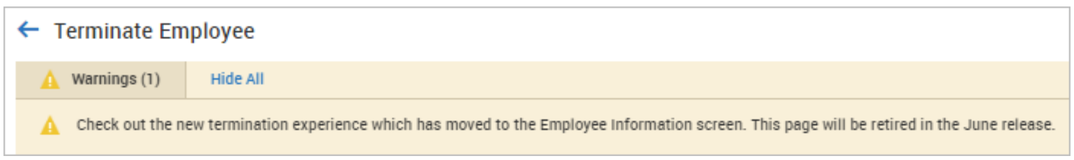
Manual Actions

Team > HR > Manual Actions

- **Hire**



- **Terminate**



Forms: Functionality Added to W4 Forms in New UI (Desktop & Mobile)

105559 & 105562: W4 forms in the New UI will now have the same functionality they have in the Classic UI.

The forms can be accessed from the following locations, where the following options can be made available as indicated below.

Managers

- *My Info > My Pay > Forms > Withholding* (Add, Edit, Delete, Download PDF, Submit)
- *Team > Payroll > Forms > Withholding* (View, Download PDF, Upload Document, Add Notes with Employee Information and Employee Quick Links)
- *Team > HR > Forms > All Forms* (This is a list report view and has Employee Information and Employee Quick Links)

Employees

- *My Info > My HR > Forms > Government Forms > Withholding* (Add, Edit, Delete, Download PDF, Submit)
- *My Info > My Pay > Forms > Withholding* (Add, Edit, Delete, Download PDF, Submit)

Hamburger Menu Search Optimizations (Desktop & Mobile)

89108: The following optimizations have been made to the main hamburger menu in the Mobile App:

- When clicking the Search input, the system instantly shows the results window, the mobile keyboard, and emphasizes the text input, allowing users to be immediately ready to type.
- The search results are filtered in real time while the user types.
- If the search window is closed, the input text is preserved until the hamburger menu is closed. When the hamburger menu is closed, the search input is cleared. If the user searches again, the system preselects the text that the user previously input.

In the New UI Desktop experience, the user is given a vertical scrollbar if the search results are more than can be displayed in the standard height of the popover dialog window.

Inline Messages (Desktop & Mobile)

96712 & 101936: In fully responsive pages in the New UI desktop and mobile experiences, the success, error, warning, and information messages are now displayed in an inline style. With this new style, multiple messages are displayed together.

The order of the messages is: Success, Error, Warning, Information

- Green Success Messages – Closeable by users and will auto-close after 5 seconds.
- Error Messages – Displays messages and if there are multiple messages, link to more will display.
- Warning Messages – Will contain a link with further explanation. Closeable by users in most cases.
- Information Messages – Closeable by users in most cases.

NOTE: This update appears in pages that have been converted to the fully responsive design in the New UI. The pages, and any related pop-ups, must be converted before this style will be shown.

Employee Information – Manual Hire (Desktop & Mobile)

91168 & 97890: In the February 2019 system release, we added basic hire functionality when manually hiring employees in the mobile version of the New UI. In this release, more functionality has now been added when manually hiring employees. The desktop version and mobile version will support manual hiring, with more coming in future releases.

Hire, Rehire and Terminate options are located under the *Team > My Team > Employee Information* page.

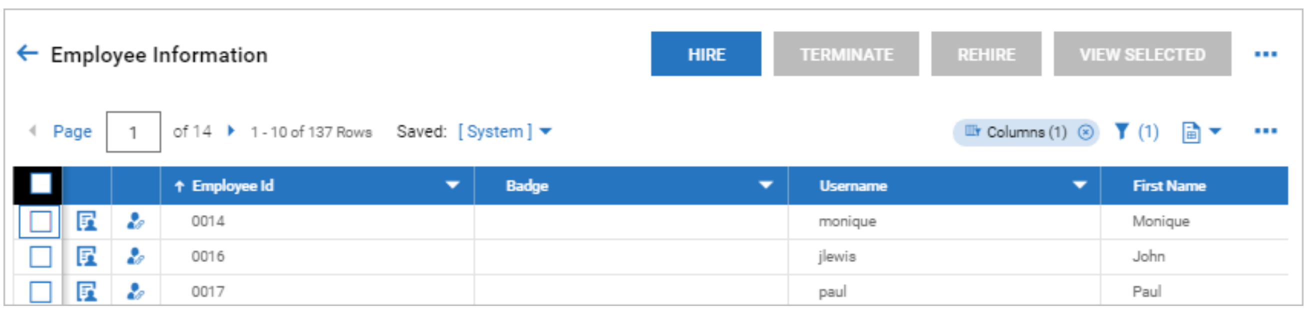
Manual Hire Options Added (Desktop & Mobile)

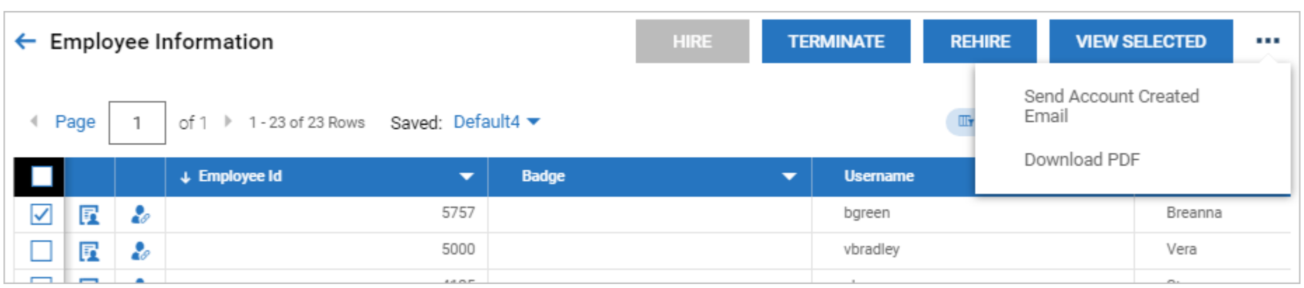
92132: The new functionality is located under *Team > My Team > Employee Information*. Options to *Hire*, *Terminate*, *Rehire*, and *View Selected* are available.

After selecting one or more employees in the list, the *Terminate*, *Rehire*, and *View Selected* buttons will activate along with the *Actions* icon. Under the *Actions* icon are the options of *Send Account Created Email* and *Download PDF*.

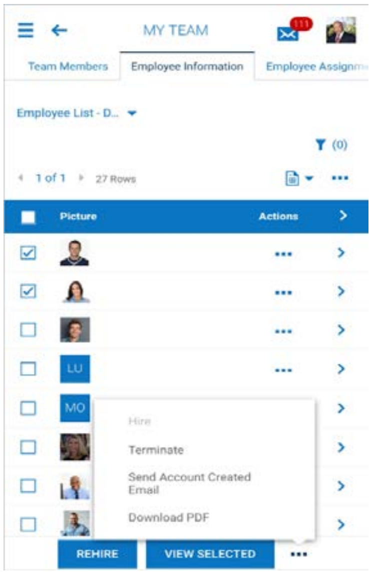
If using the *Send Account Created Email* option, you must have a notification configured. This is done under *Company Settings > Global Setup > Notifications*. Configure the *Created* notification, located under the *Account* category.

Desktop





Mobile



NOTE: In the desktop version, the *Hire* and *Terminate* options located under *Team > HR > Manual Actions* will be deprecated/removed in the June system release. Warning messages have been added to these menu items to warn users and inform them to access Employee Information. See deprecation examples in 106386 above.

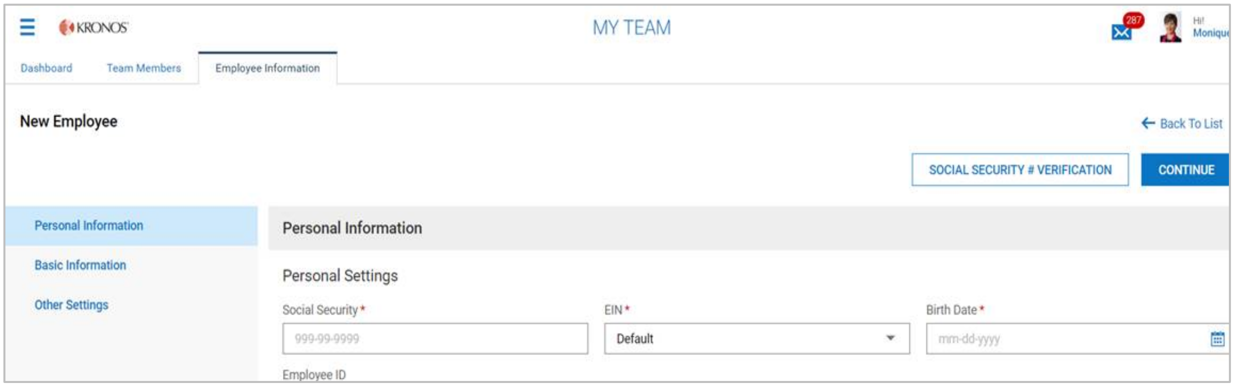
- Security Permissions - To provide users access to Employee Information, and give them permission to the *Hire*, *Rehire, and Terminate* buttons, ensure the *Employee Information (My Team)* setting under the *HR* tab is set to *View/Edit* with the *Add* checkbox checked. This is located under *Company Settings > Profiles/Policies > Security*.

Other Options Added in Employee Information

In addition to the Hire, Rehire, and Terminate, the options below are available during the hiring process with some available after hiring an employee and the account being active in the system.

Social Security # Verification (New UI Desktop & Mobile)

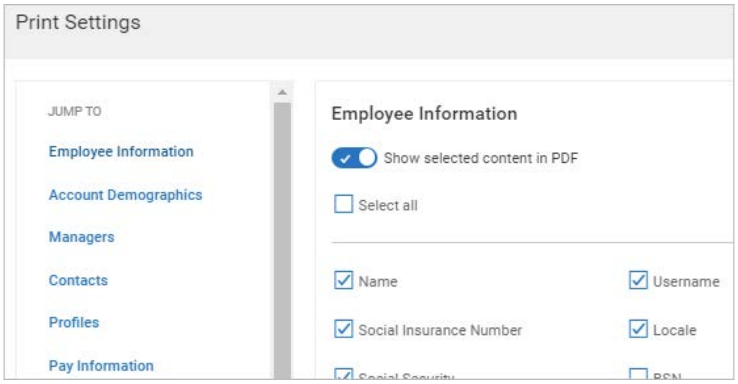
104114 & 109706: If using the *Social Security # Verification Service* Marketplace product, the *Social Security # Verification* option will now be available in the New UI when manually hiring employees. The button will display on the widget containing the Social Security field.



Download PDF (New UI Desktop & Mobile)

98138 & 92132: In the *Employee Information* page, account information for employees can now be download in PDF. The download pop-up will list all the account widgets on the left. These widget names are hyperlinked, and when clicked, will open the fields for that widget.

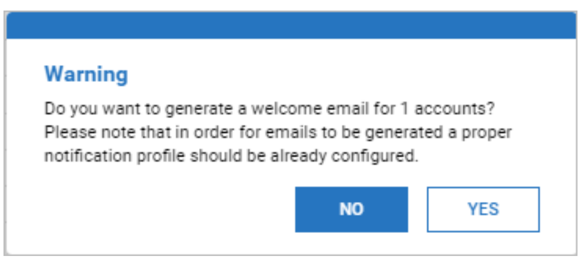
Options to turn off/on the fields is available for each widget, along with the option to select all fields in the widget. Once all are selected, individual fields can be de-selected. The *Annual Compensation Graph* has a date picker to allow to select the yearly date to sample compensation.



- Mobile: *Team > My Team > Employee Information* – Select one or more employees and select the *Actions* icon in the upper-right portion of the page and select *Download PDF*.
- Desktop: *Team > My Team > Employee Information* – Select one or more employees and select the *Utilities* button and then select *Download PDF*.

Send Account Created Email (New UI Desktop & Mobile)

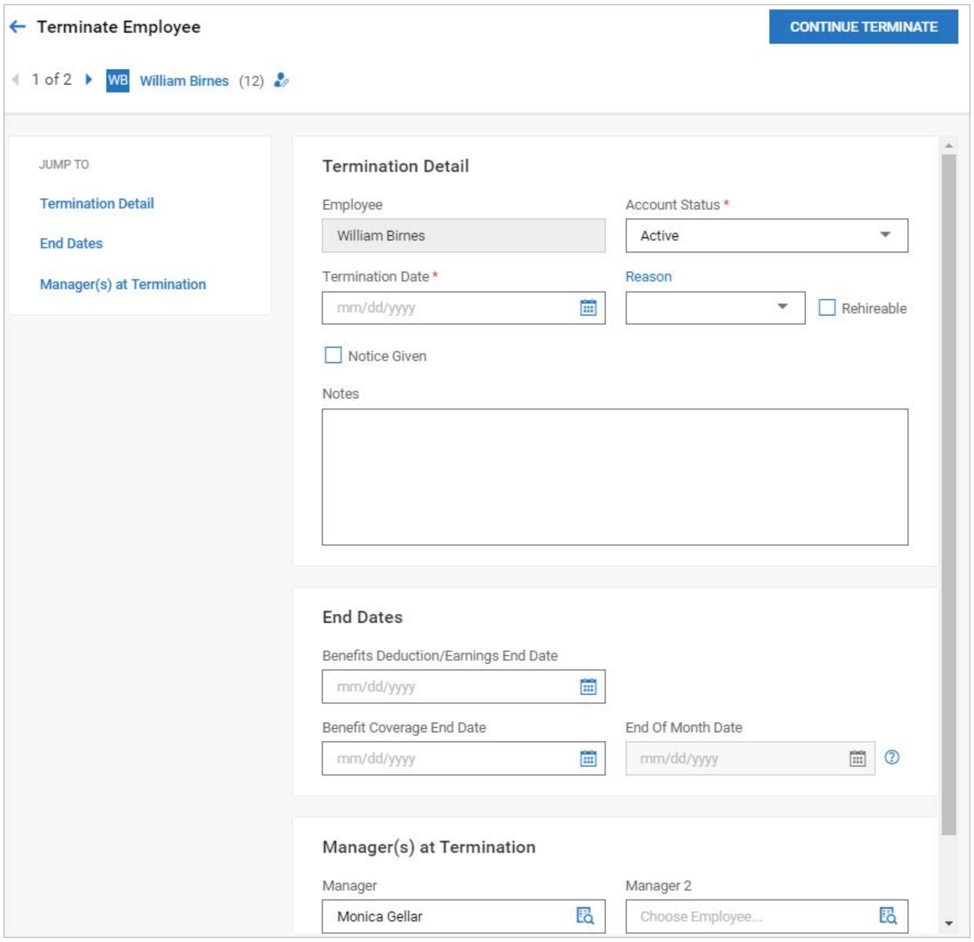
98137: In the *Employee Information* page, the *Send Account Created Email* option will send a welcome email to newly hired employees. A *Created* notification must be configured in the system for the email to be sent. The *Created* notification is located under *Company Settings > Global Setup > Notifications*, in the *Account* category.



- Mobile: *Team > My Team > Employee Information* – Select one or more employees and select the *Actions* icon in the upper-right portion of the page and select *Send Account Created Email*.
- Desktop: *Team > My Team > Employee Information* – Select one or more employees and select the *Utilities* button and then select *Send Account Created Email*.

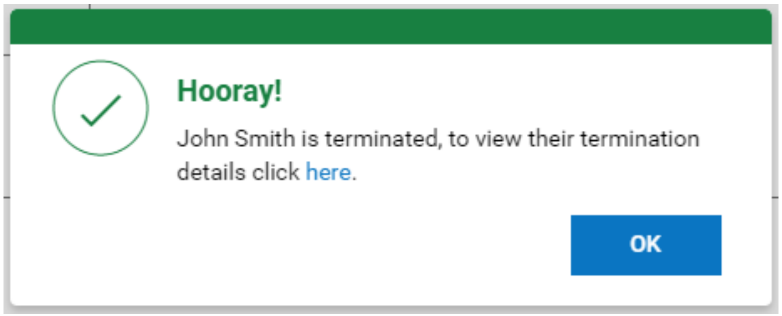
Terminating Employees & Termination Details (New UI Desktop & Mobile)

107653, 91170: When terminating employees, you can select one or more employees and use the *Terminate* option in *Employee Information*. Termination details will display with *Jump To* links on the left and widgets on the right. If more than one employee is included, you can use the directional arrows to roll forward and backward in the selections. To cancel termination, use the back arrow next to the *Terminate Employee* label.



Additional Termination Details

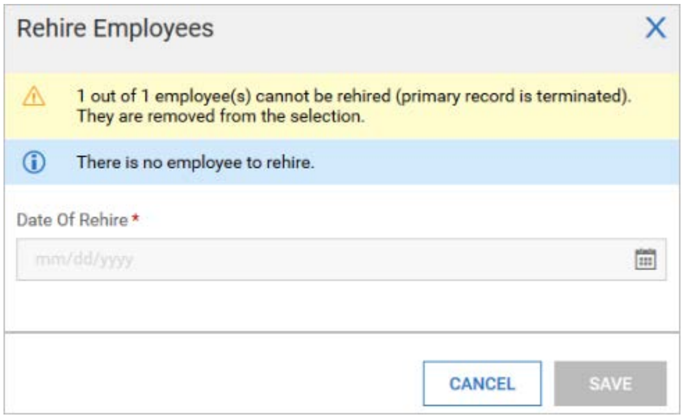
When termination is complete a link will be available in the confirmation pop-up, and when clicked, will display termination details.



Re-Hiring in Multi EIN Companies (Classic UI & New UI)

105252, 109636 & 74291: In the case of a primary account being terminated, if attempts are made to re-hire an employee into a secondary EIN, a warning message will display informing you that the employee cannot be re-hired because the primary record is terminated.

To correct the warning, you should edit the employee account and set the secondary EIN as the primary. After doing this, you can then re-hire the employee.



Required and Default Settings for Fields in Global Setup Based on EIN (New UI)

99848: For Multi EIN companies using the New UI, the required and default values that are set in Company Setup, and used when manually hiring employees, will now be supported as they are in the Classic UI. This will also apply when using the Hire HR Action.

My Mailbox: To Do Items Support (Mobile)

88220: Users now have access to a growing set of To Do Items from the *My Mailbox* page. Pages containing the links to additional information, forms or buttons that can be used to complete tasks can be accessed directly from the list on the *My To Do Items* tab on the My Mailbox page.

Approve and *Reject* buttons often appear in the To Do item details, enabling users to approve an item assigned to them in just two steps.

The types of To Do items that are supported on the *My To Do* tab are listed in the table below.

Workflow Type	To Do Type(s)	Release
Timesheet Request	Auto Approve Timesheet Auto Reject Timesheet Approve Timesheet Reject Timesheet Approve Time Entries Reject Time Entries	April, 2019

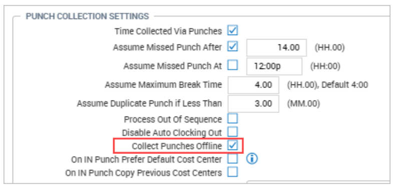
Individual Data Removal	Approve Reject	April, 2019
Incident Types	Approver Sign Close Incident Employee Sign Approve / Reject Collect Note	February, 2019
Job Requisition	Approve/Reject	February, 2019
Questionnaire	Display Message Question	February, 2019
HR Action Request	Initiate HR Action Collect Note	February, 2019
Leave Of Absence Requests	Collect Note	February, 2019
Timesheet Request	Collect Note	February, 2019
Overtime Request	Activate Contract	February, 2019
Time Off Request	Activate Contract Collect Note	February, 2019
Virtual Code: Account Approval	Approve / Reject	February, 2019
HR Action Request	Approve/Reject Initiate HR Action Terminate	October, 2018
System Defined Workflow*	Form W4	December, 2018
System Defined Workflow*	Form I9	December, 2018
Timesheet Change Request	Approve / Reject Timesheet Change Request	2018

*A system-defined workflow will automatically trigger the creation of the To Do item following a user's action. For example, following creation of the form the ToDo item for completion of the form is created.

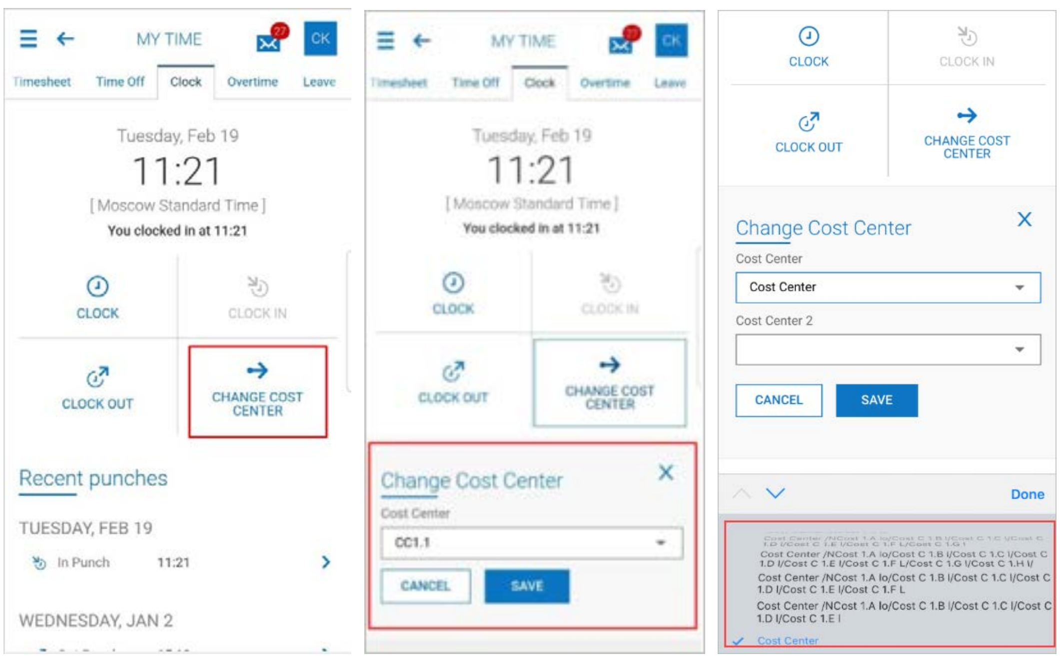
Offline Cost Center Changes (Mobile)

88940: Employees can now include cost centers with in/out punches when their mobile devices are offline. This reduces the amount of manual timesheet editing required from managers to ensure accurate labor tracking. Employees can now select cost centers from a list of their most frequently used cost centers. The selected cost centers are stored on the device and transferred to the system following the first successful login after the device is back online.

Employees must have the appropriate permission in their timesheet profiles to store punches offline.



In the New Mobile App, employees can tap on *Change Cost Center* on the *Clock* tab. If the device is *online*, the user can then browse to the cost center. The device will store up to nine cost centers in an MRU (Most Recently Used) list. When a user taps on the *CHANGE COST CENTER* button and the device is *offline*, the MRU list will be presented to the employee and the employee's punch is stored with the selection from the MRU list. The next time the device is online and the employee logs in, the stored punches and cost centers that were selected from the MRU list are uploaded to the system.



40403: The end of the path to the cost center is displayed in the MRU list. This portion of a long path is the most useful when selecting the correct cost center for a job transfer.

Perspectives Tile Added (Mobile)

93357: In the New UI Mobile Experience, we have made available a new dashboard *Perspectives* tile based on configuration in your Employee Perspectives functionality.

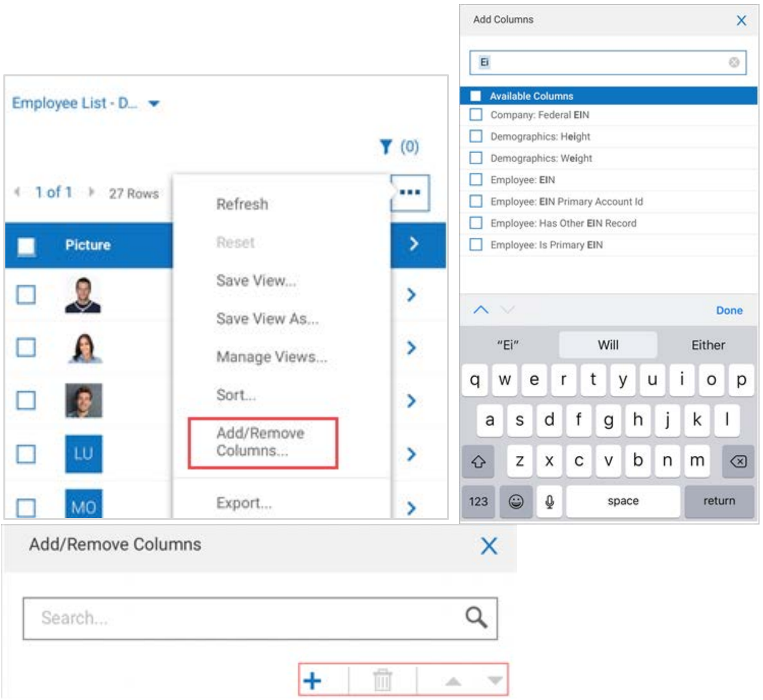
- The tile is available to be added to the New UI Dashboard Layout profile, located under *Company Settings > Profiles/Policies > New UI Dashboard Layout*. The window is named *Team Perspectives* and can be added to the profile.
- The tile will display in the Home dashboard for mobile users and is named *Perspectives*. The *View Perspectives* hyperlink will open the *Perspectives Score* report and display all included employees and perspectives, along with the scores for each.
- To view the makeup of the team perspective score for each perspective, click the associated hyperlink. A report will open displaying each employee and their individual scores used to determine the average team score.
- If there are more than 6 perspectives, the directional arrows will move to the next page and back again.

Reports

The following enhancements have been completed for reports in the New UI.

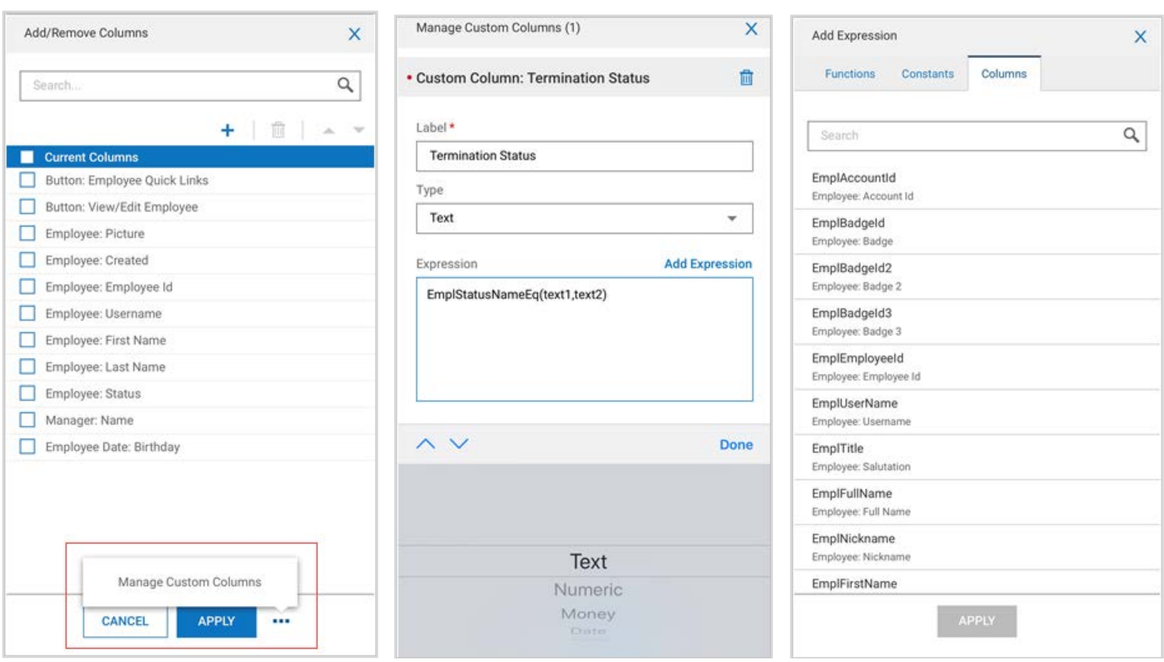
Support for Add/Remove Columns (Mobile)

104473: In the New Mobile App, you can now add, reorder or remove columns in reports to see the information that is most relevant to you. From the triple-dot icon in a report, select *Add/Remove Columns.* Click on the appropriate icons to add a column or remove a column. To quickly find a column to add, you can enter a few characters in the *Search* field. Tap the arrows to change the order of selected columns in the report.

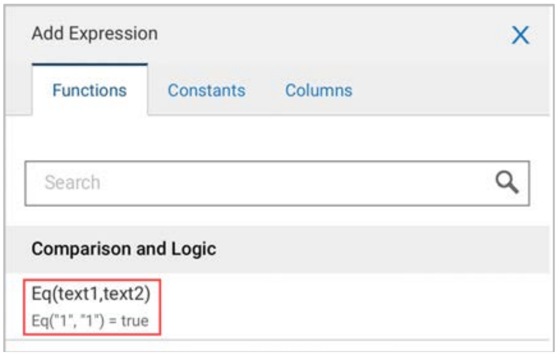


Custom columns can be created and added to the report by clicking *Manage Custom Columns* from the triple-dot icon on the *Add/Remove Columns* pop-up. From the *Manage Custom Columns* pop-up, you can enter the column name and field type, and create expressions using functions, constants and columns.

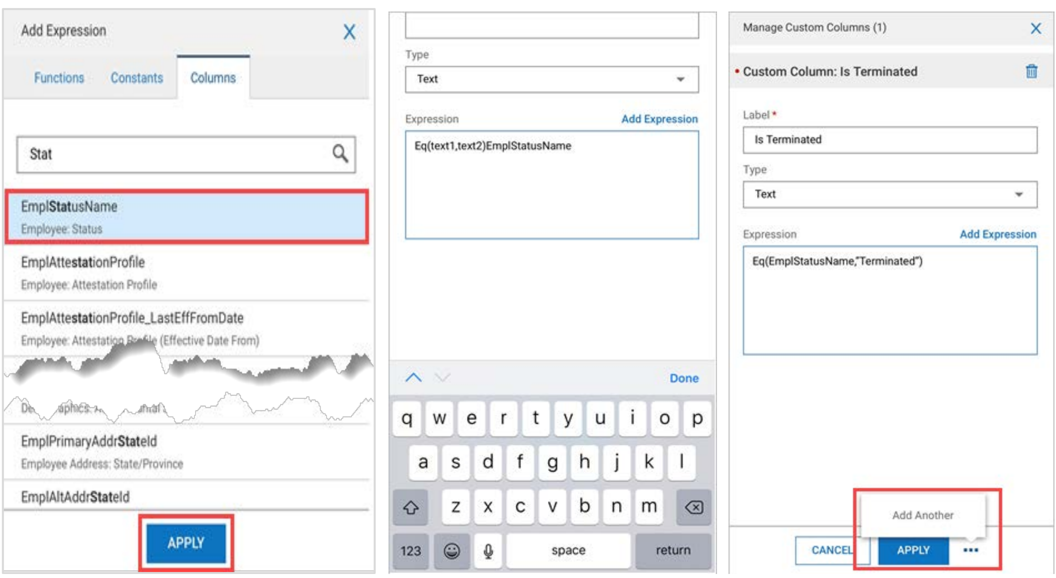
To create an expression, tap the *Add Expressions* link. On each tab, you can select the pieces that you will need to build the final expression. Functions are operations that produce the value shown in the report, using constant values (on the *Constants* tab) or data fields pulled from the system (on the *Columns* tab). Clicking the *APPLY* button on the tabs will add the item to your expressions box on the *Manage Custom Columns* pop-up, where the final expression can be edited.



For example, to add a column that returns True or False to indicate if an employee is terminated or not, you would create this expression: Eq(EmplStatusName, “Terminated”). From the *Functions* tab, you would find and add this function to the expression box by tapping the *Apply* button at the bottom of the page.



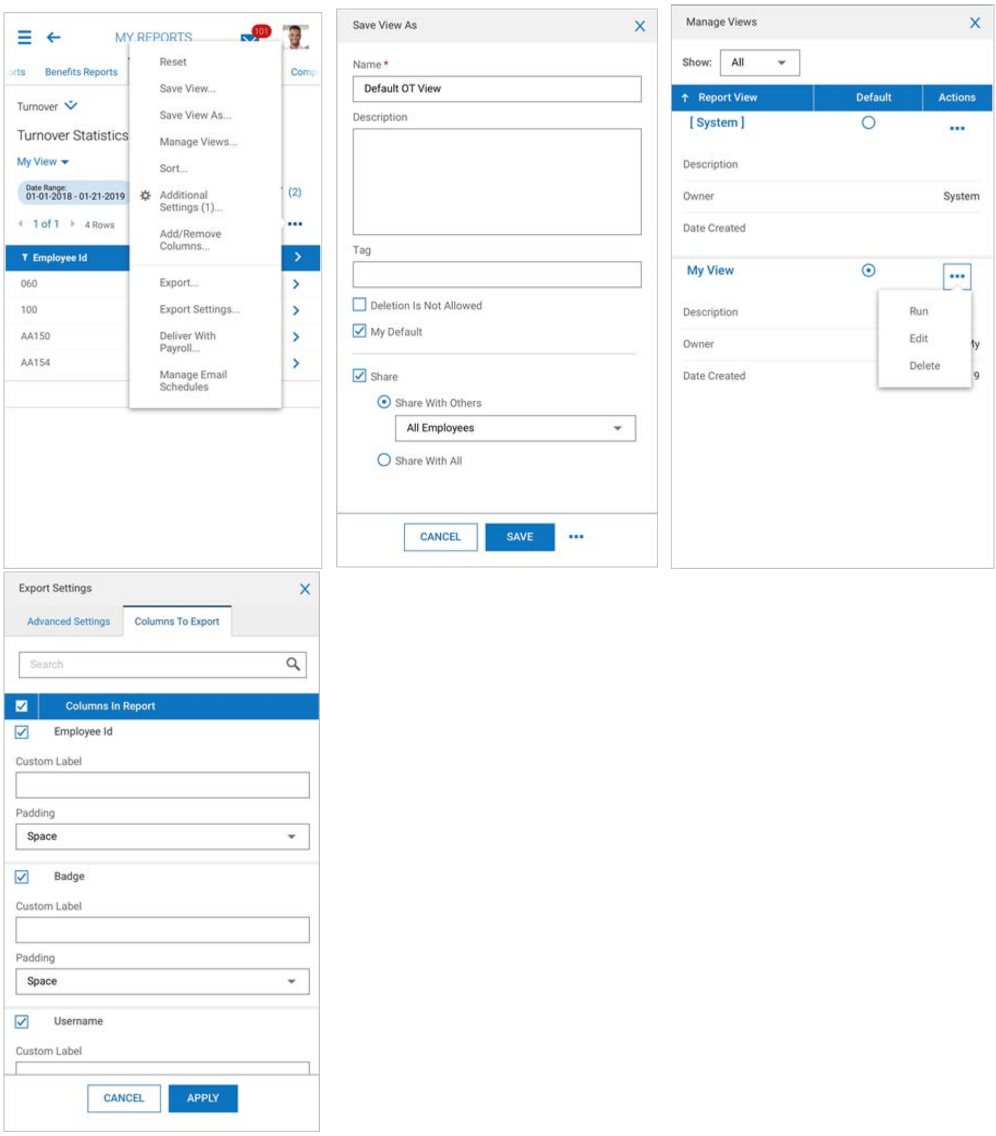
From the *Columns* tab, you would find the name of the data field that represented the employee status, select it and tap the *Apply* button to save the column.
Both items are added to the *Expression* box on the *Manage Custom Columns* pop-up, but they are added in the order in which they were selected from the tabs. To complete the expression, you’ll need to edit the text in the *Expression* box. The column will appear in the list of columns on the *Add/Remove Columns* pop-up.



After the label and expression are completed, you can tap *APPLY* to add the custom column to the report.

Views and Exports (Mobile)

New Mobile App report users now have the same options available for saving views and exporting reports as desktop users.

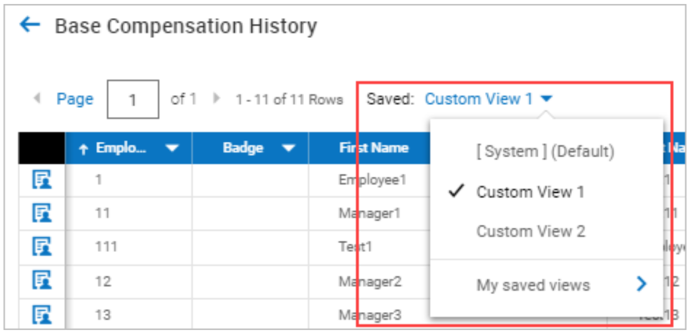


104860: After tapping the Actions triple-dot icon, the *Save View* and *Save View As* options are now available. If the report has been modified, but not yet saved, the *Reset* option can be used to return to the default view. When saving a view, you must provide a name and can optionally add a description and tag. You can make the view the default, disable deletion of the view and share the view with other employees.

104862: The *Manage Views* option enables users to *Run* or *Delete* an existing view. The *Edit* option under *Manage Views* allows you to change the view settings, such as name or sharing.

104857: Export settings including layout, margins, font size, page break, header and footer display, column name display, and totals display options are now available in the New Mobile App. The character used to populate fields that do not contain data can be selected as well. All columns are included in the export file by default, but the columns can be limited in the export settings.

92604: When a report has more than one view, the view selector is now aligned with other controls in the report header.



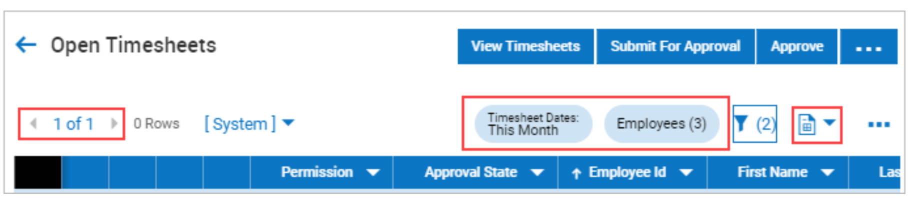
Header Enhancements (Desktop & Mobile)

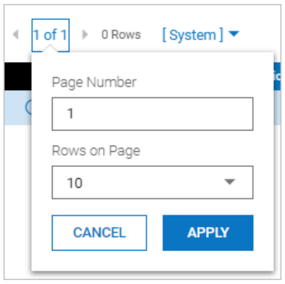
92604: In the New UI desktop and mobile experiences, the headers above reports can become crowded with pills, text and icons. Enhancements in this release ensure that important controls are always available in the headers, cleanly aligned and easy to find at low screen resolutions.

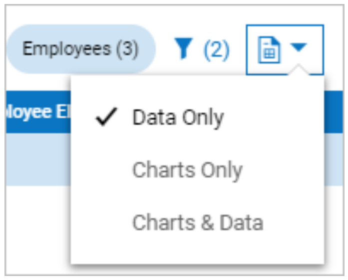
Initially, all filters and controls are aligned on the same line.

As screen resolution decreases, several changes occur:

- The *Page* link and page selection box are replaced with a single link showing the page number and total number of pages. When clicked, the new link displays a pop-up where both can be selected.
- The text in the pills is stacked, arrows and icons are removed from the pills, and the pills become more compact.
- Chart viewing modes are included in a drop-down without any text. Hovering over the icon shows the selected chart viewing mode.
- If the report contains additional settings, the gear icon will be removed at smaller resolutions. At those resolutions the, additional settings can be accessed from the menu under the triple-dot icon.
- If the employee filter used a single company group, the name of the group was displayed. To save space in the header, the name of the company group is no longer displayed. The number of employees in the filter is listed instead.

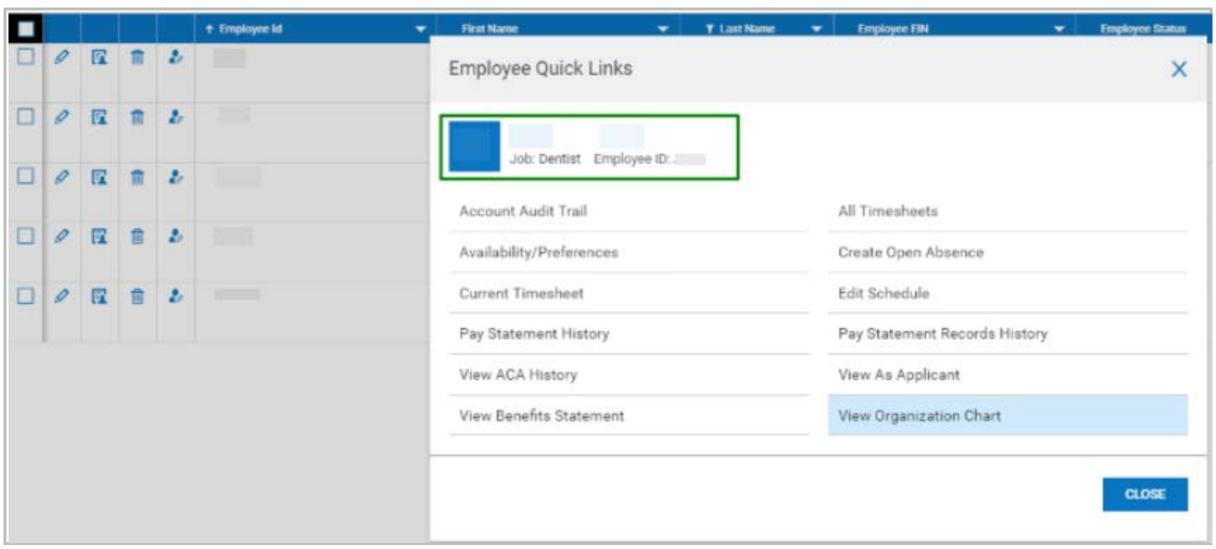






Report State Preserved while Viewing Employee Profile via Quick Links (Desktop)

106577: Changes made to reports are now preserved when a user navigates to an Employee Profile via Quick Links, allowing the user to view the report in the same state and not lose changes made when returning to the report. Modifications to report settings such as sorting, column and/or global filtering, column settings, column lists, etc. are now preserved. When the user clicks the back button to return to the report, the report remains in the same state and the Quick Links pop-up is closed.



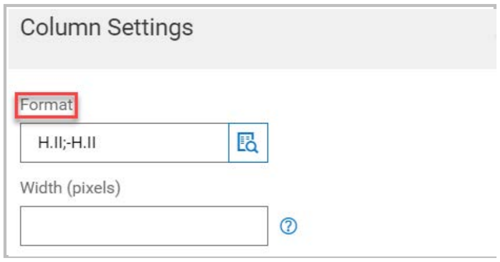
Preserve Report Context When Navigating Away From a Report (New UI and Mobile)

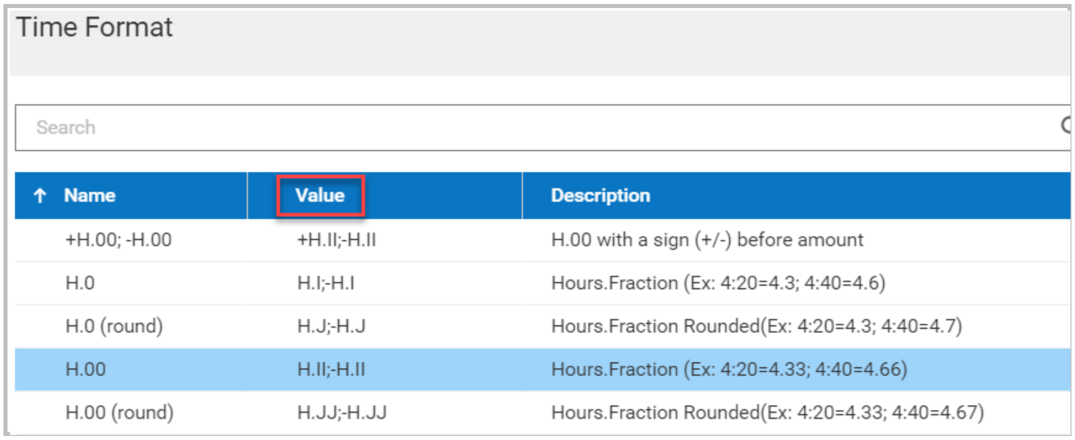
98653: In the New UI Desktop and Mobile experience, report views that have been modified but not yet saved are now preserved when users click on report-based buttons/links and then navigate back to the report view. Changes such as sorting, grouping, and filtering are preserved.

When a user clicks on a page level or row level action in a report, the options set in the unsaved view of the report such as added/removed columns, sorted columns, updated grouping, etc. are preserved The unsaved view may not be preserved if users navigate away from the report using the Main Menu, using another tab in Mobile, or if accessing something other than Employee Information in the Employee Quick Links.

Two Columns in Time Format Lookup for Column Settings (Mobile)

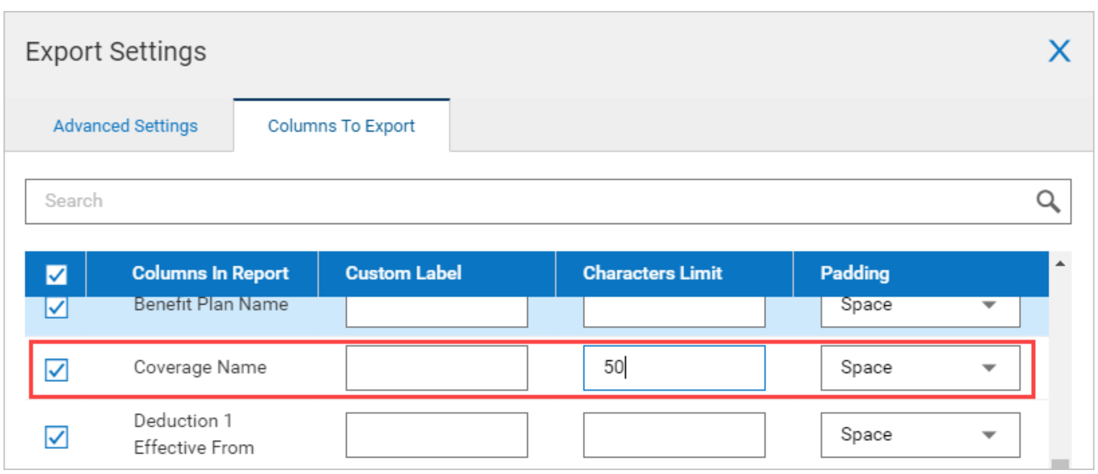
106151: Users can now see the actual value tied to the Time Format in the Column Settings for columns in reports. Upon selection of the appropriate *Format*, the *Value* is displayed in the field.



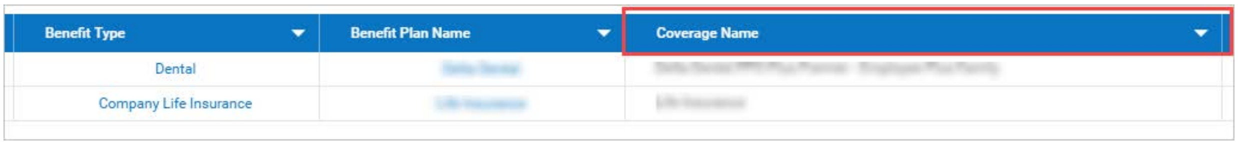


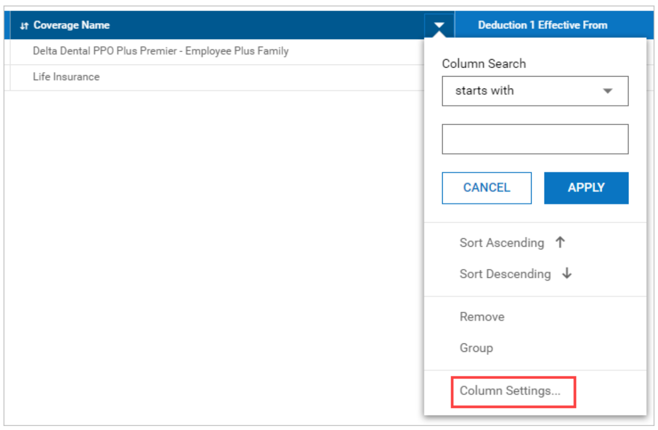
Character Limits for Exported Columns (New UI Desktop)

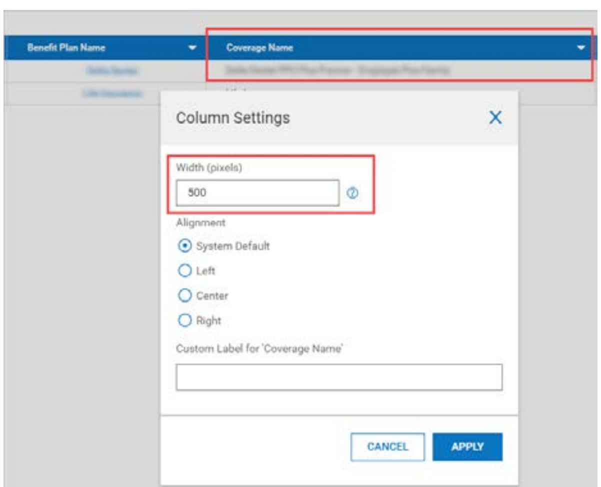
100808: When exporting reports, the length of the text in a field can be controlled by specifying the *Characters Limit* in the *Export Settings*. In the example below, the *Character Limit* of 50 indicates that only the first 50 characters of text will be included Coverage Name field in the .txt file export. As with the Classic UI, the *Character Limits* only affect .txt files. Character limits are set in the *Export Settings* for the report.



For columns that display lengthy text onscreen, the column width is limited by the *Width (pixel)* settings. In the example below, you can see that when Width (pixels) is set to 500, the column displayed onscreen is wider than other columns.







Report Charts & Dashboards

The following enhancements have been completed for report charts and dashboards in the New UI.

Dashboard Sharing and View Edits (Desktop & Mobile)

To address issues found when dashboard views were shared with users who did not have access to reports or report views used in the view, the dashboard views have been enhanced.

Dashboard Sharing Problems

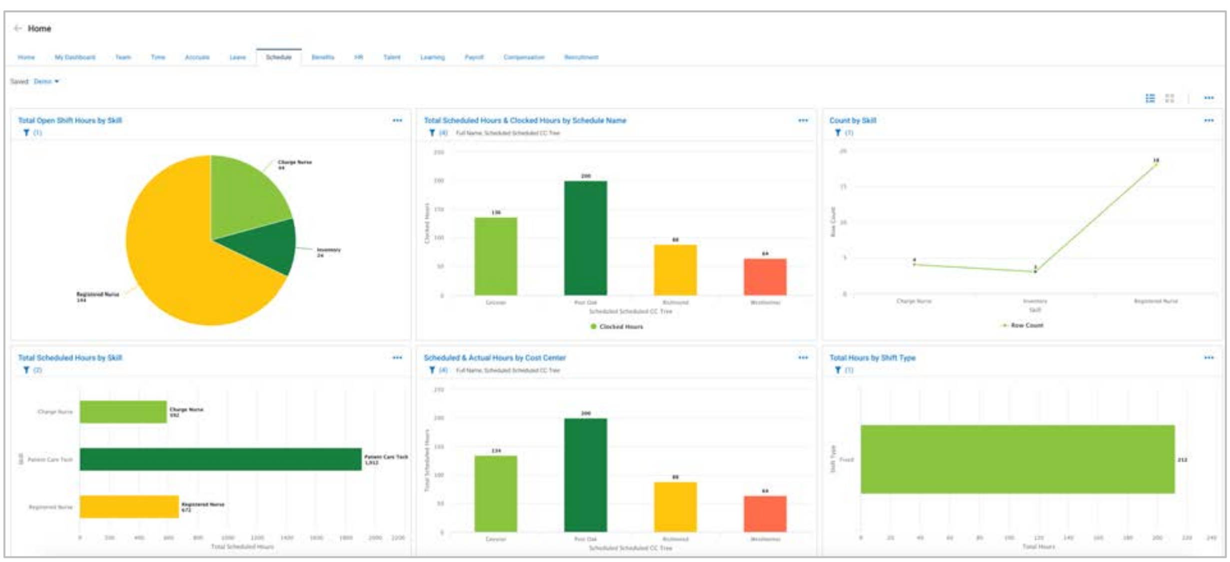
For example, Tim creates a Schedule Dashboard using six charts. Three of these charts come from the Open Shifts report, and the other three come from the Roll Call report. He then saves and shares the view of this dashboard.

Users who either do not have access to one of these reports or who do not have access to the particular view of a report used could only see empty spaces where charts should be. They would also then be unable to remove these blank spots even when saving a new view to work with. In this release, we now provide those users with information about why the blank spaces appear and who to contact to enable access, as well as options to remove the blank spaces from their dashboards and replace those charts with more useful information.

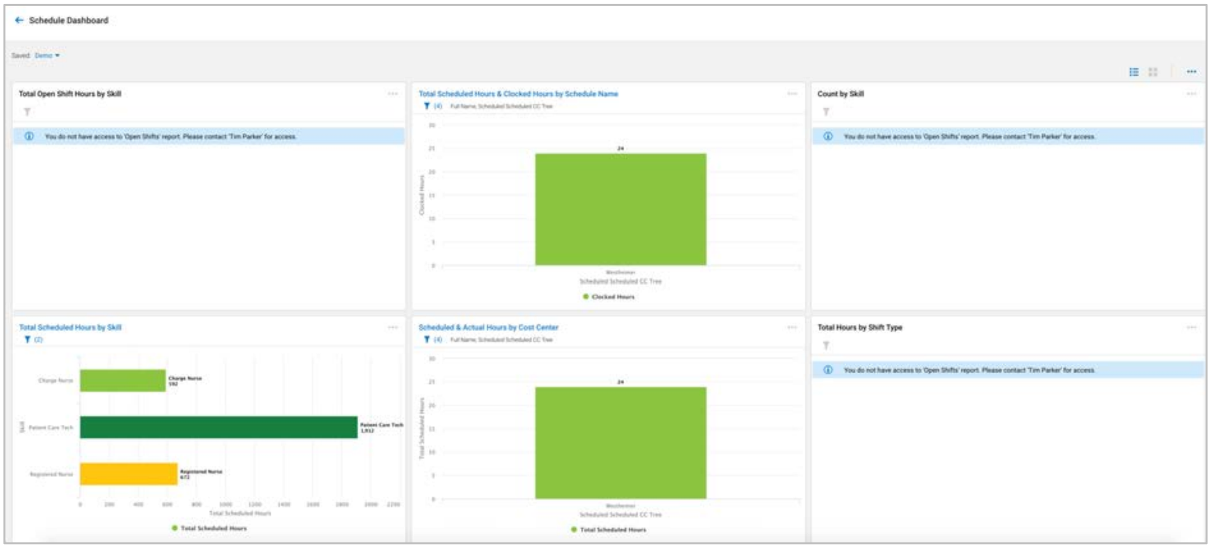
The process to handle these scenarios is as follows:

Scenario 1: User Does Not Have Access to Report

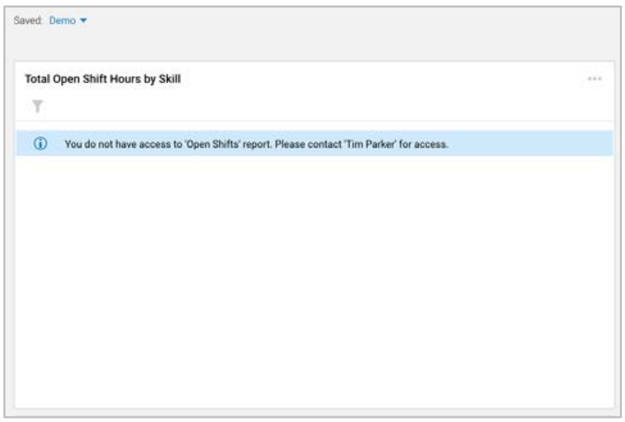
In Tim's Schedule Dashboard, he saves a view and shares with all managers.



Anna does not have access to the Open Shifts report through her security profile. This report was used for three out of the six charts used in the view. When she logs in, she will now see empty chart frames, instead of completely open spots.

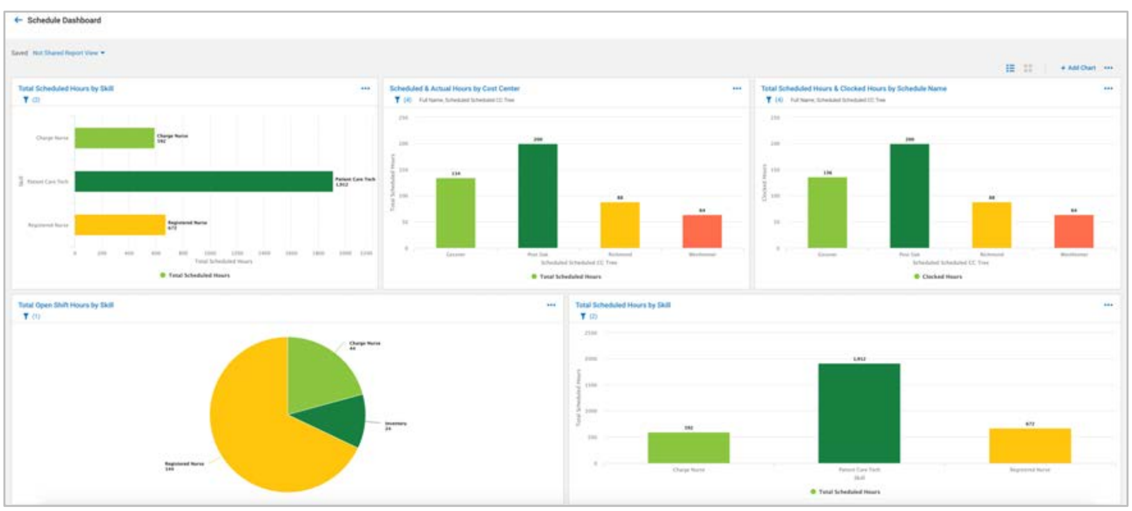


These empty chart frames now also come with messages that direct the user to a call to action. In the case where Anna does not have access to the report, the following message appears:

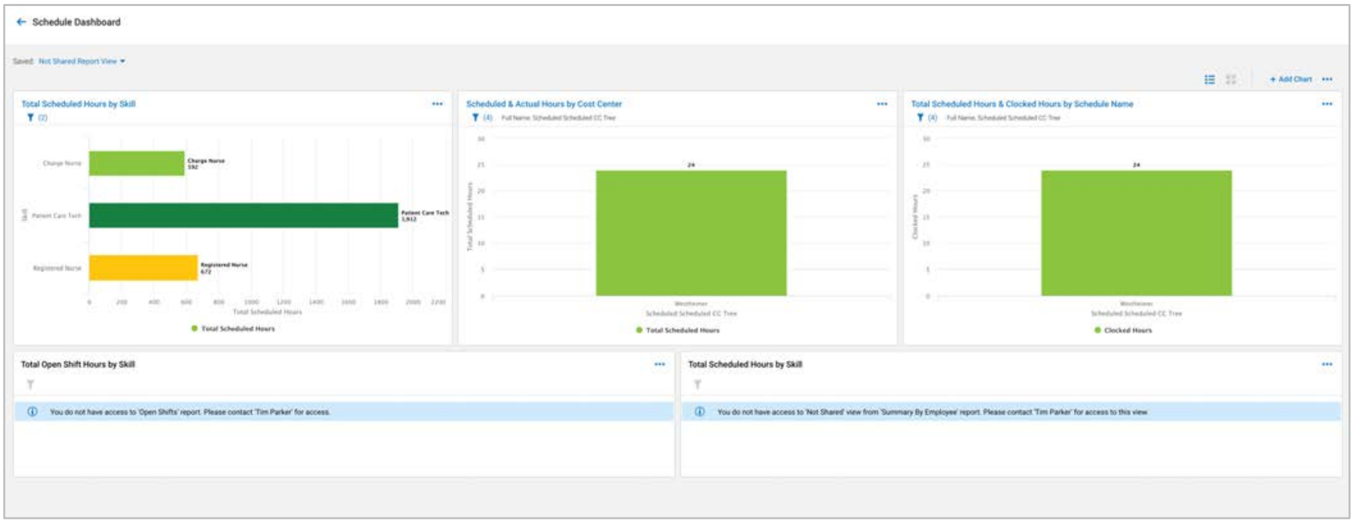


Scenario 2: User Does Not Have Access to Report View

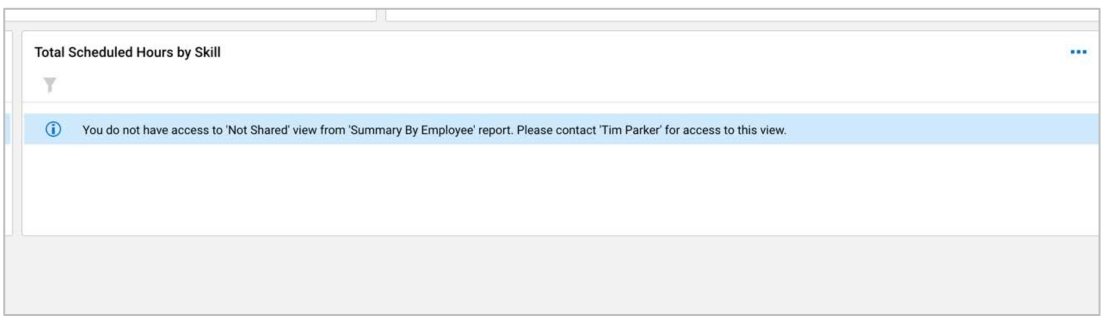
In Tim's Schedule Dashboard, he saves a view and shares with all managers.



Anna does not have access to the view used in the Summary by Employee report, as this view was not shared with others. This report view was used for one of the charts used in the dashboard view. When she logs in, she will now see empty chart frames, instead of completely open spots.



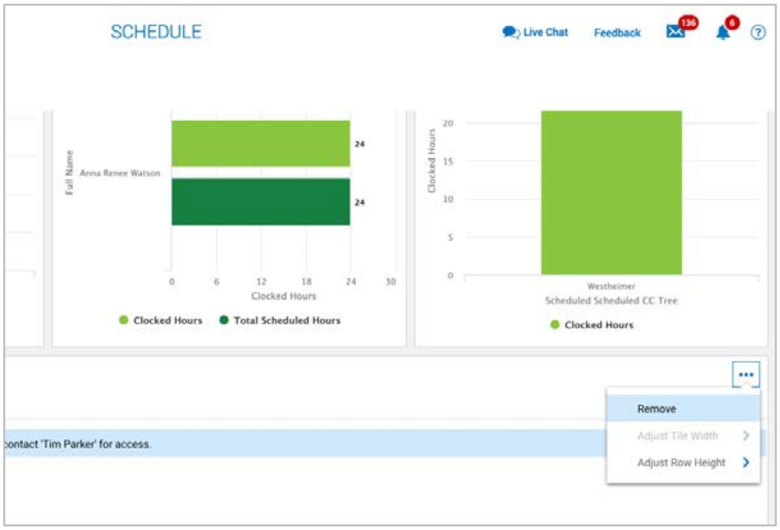
These empty chart frames now also come with messages that direct the user to a call to action. In the case where Anna does not have access to the report, the following message appears:



How to Edit Dashboard Views

Since the owner of a dashboard view is the only person who can edit that view, this will be read-only for every other user the view is shared with. For a user who is accessing a shared view and does not have access to certain charts, who also wants to manipulate the view to a degree (remove said charts and add new), these are the steps they need to take:

1. In the dashboard view, click the Action menu and select *Save View As…*
2. Give this view a name and *Save*
3. Once in the new view, users will be able to remove unwanted chart frames by clicking the *Action* menu and selecting *Remove* in each individual frame. New charts can then be added by the user.



Multiple Categories in Charts (Desktop & Mobile)

96859: Users can now use more than two categories when building a chart. The metrics must use the same calculation. For example, in the world of Succession Planning, the following might be used:

- Employee History Graph to review Potential and Performance measures for a single employee
- Metric Bar Chart to examine the distribution of Risk of Loss and Readiness

In succession planning, users may need to chart using a wide combination of categories. In addition to the items mentioned above, you may need to track employee history based on:

- Impact of Loss
- Reliability
- Happiness
- Collaboration

This is available across the board for normal chart configuration.

Schedule vs. Actual Report in Dashboard List (Desktop & Mobile)

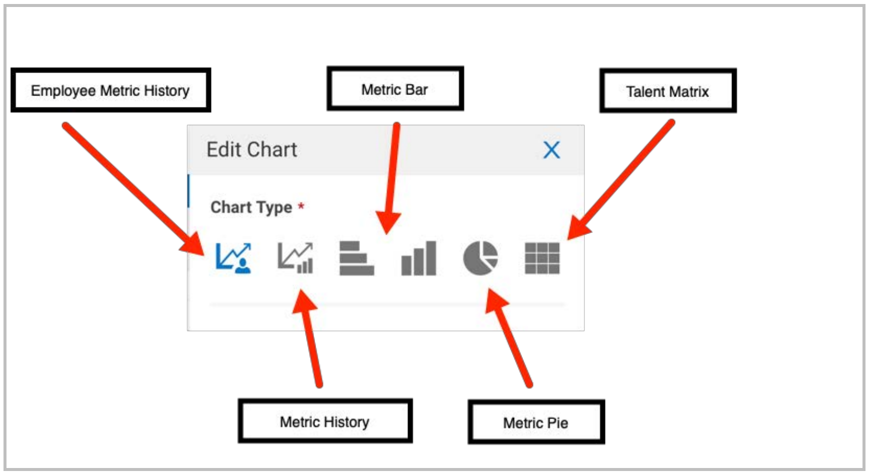
105983: The Schedule vs. Actual Report (*Team > Schedule > Reports > Attendance > Scheduled vs Actual*) is now available as an option for the following dashboards:

- My Dashboard
- Team Dashboard
- Schedule Dashboard

This report is available for use in charts, so it is now also available from a dashboard perspective.

Report Charts & Dashboards: Charts for Succession Planning (New UI)

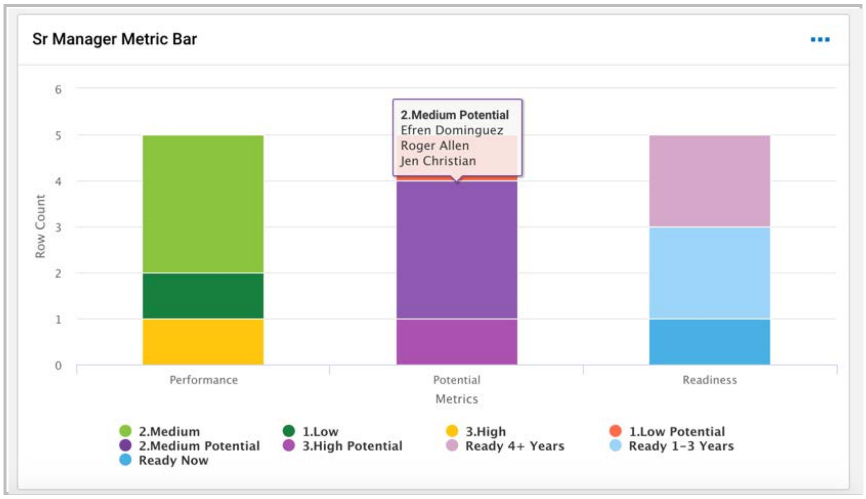
73275: Previously, users could build charts using the Succession Planning report, but were unable to focus in on a particular Succession Profile unless using the global report filter. This made it impossible to have multiple charts using multiple profiles in the same report view. The configuration for these charts and graphs has been updated and they are now available for inclusion in the Succession Planning Dashboard in the New UI environment. The charts support all metrics for Succession Planning.



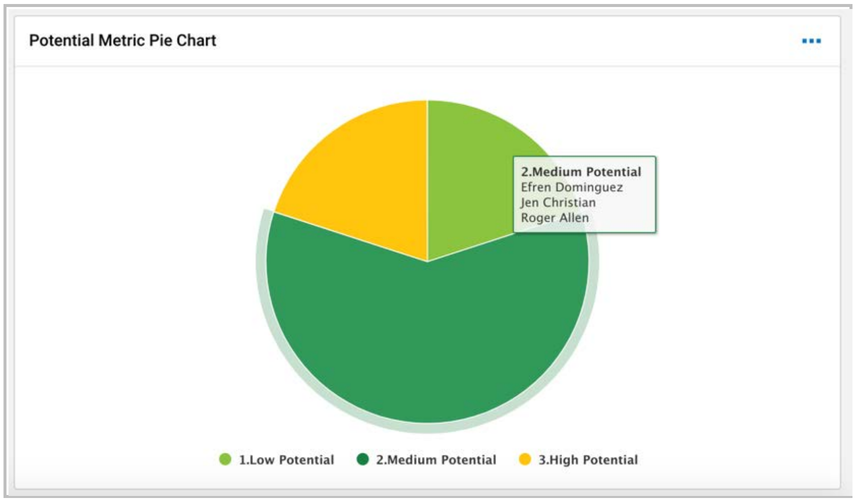
- **Employee History Graph** (75740) – This is the line chart that displays the historical record of an employee's Succession profile metric(s). When the chart is presented, there are details provided as the user hovers over the chart area, such as the employee's status for a particular metric.

- **Metric History Graph** (75747)– This is the line chart for metric history. When the chart is presented there are details provided, such as the status, when the user hovers over the chart area.

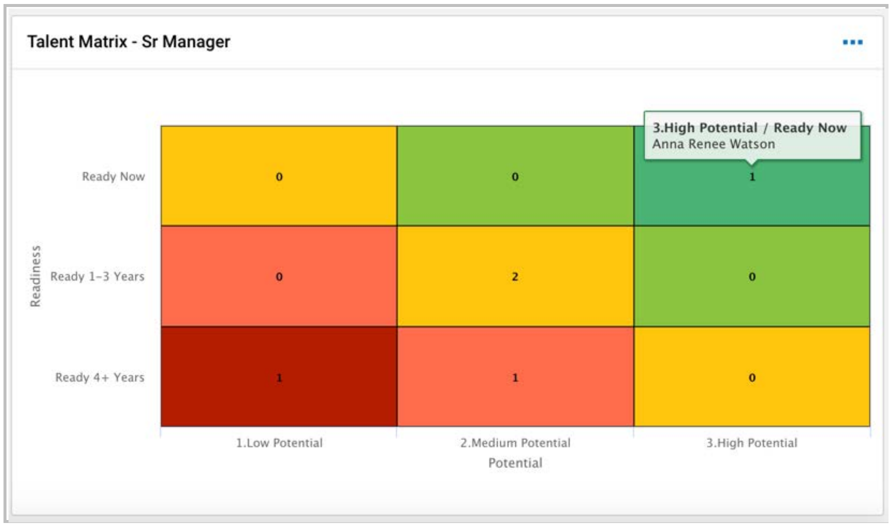
- **Metric Bar Chart** (75744) - This is the horizontal bar chart that displays the level of Succession Profile metrics for an employee or group of employees. When the chart is presented, the user can perform certain interactions such as:
  - Switching between a grouped or stacked view.
  - Clicking inside the chart, which sends the user to the Successions Plan page (when on the Succession dashboard).



- **Metric Pie Chart** (75750) – This is the pie chart that displays the level of Succession Profile metrics for an employee or group of employees.



- **Talent Matrix Chart** (75753) – This is the heat map chart for Talent Matrix. Users can hover over each box to view the employee name(s) associated along with the status.

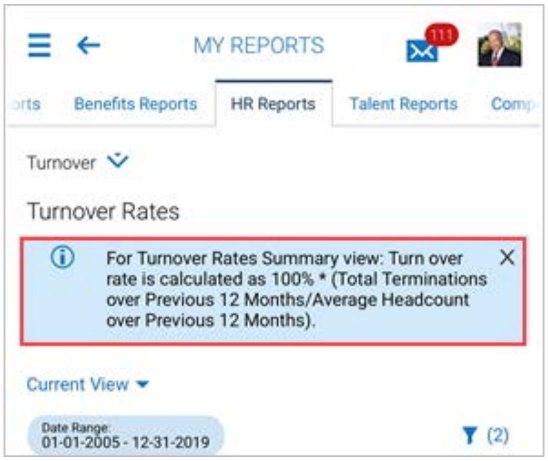


Users can add a Succession Chart by updating the mode to *Charts and Data* or just *Charts*, which in turn provides the option to *Add Chart*. This opens a side panel allowing the user to choose a specific Chart Type. The same chart type options as standard charts are available; however, these chart types are linked to certain Succession options.

NOTE: For users who have previously created charts using the Succession Plan report in the New UI Environment, it is more beneficial to update these visuals to the new configuration.

Turnover Rate Formulas Added (New Mobile App)

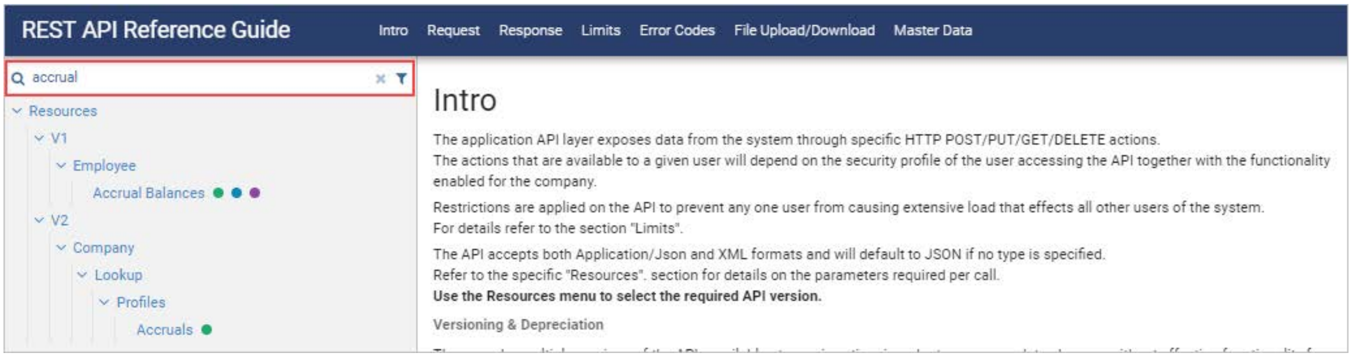
86023: The formula used in calculation of the turnover rate is now displayed in the Turnover Rates report in the New Mobile App.



REST API Documentation Updates

104839: A *Search* tool has been added to the API documentation, which eliminates the need to select the appropriate version of a REST API and navigate through a hierarchy of resources. Simply enter a few characters and the *Search* tool will return links to all the related documentation from both the V1 and V2 APIs.

NOTE: With this change, the URLs for the documentation have been updated. Using the previous links to documentation will result in *Page Not Found* errors. Please use the links above to access the new documentation and update any stored bookmarks.



REST API Deprecation

There are no APIs scheduled for deprecation at this time.

Admin Enhancements

The following administrative enhancements have been added to this release.

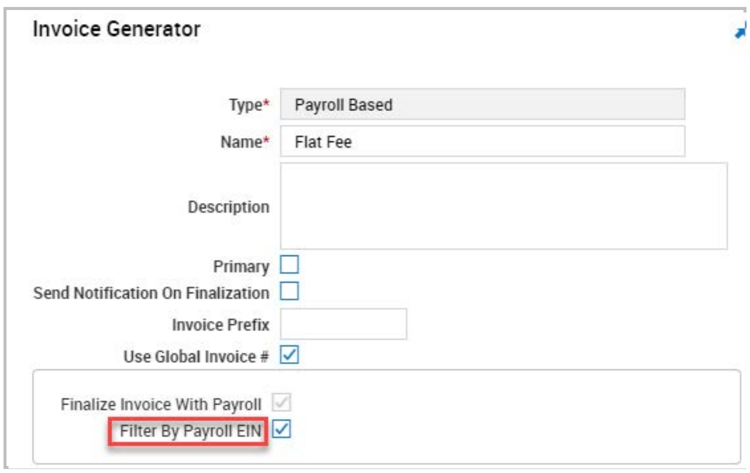
Billing: Billing Trigger for Has Accrual Profile Assigned

98047: When the Accruals functionality is enabled from the Edit Company screen, and an Accruals profile is assigned/modified for an employee, the count of the employee(s) with the Accruals profile assigned/modified is included for the *#Employee*, *#Employee: Wholesale*, *#Person*, and *#Person (Wholesale)* calculation methods.

When the Accruals functionality is turned off from the Edit Company screen, the system does not get a count of the employees with Accrual profiles assigned/modified for the *#Employee*, *#Employee: Wholesale*, *#Person*, and *#Person (Wholesale)* calculation methods.

Billing: Separate Invoices, Bank Accounts by EIN for Payroll Based Generators

60168: Multi-EIN filtering options that are compatible with the *Filter by Payroll EIN* option have been added to all Billing Services that begin with *Payroll*. Two additional calculation methods have been added to track TLM and HR in Payroll Based Invoice Generators.

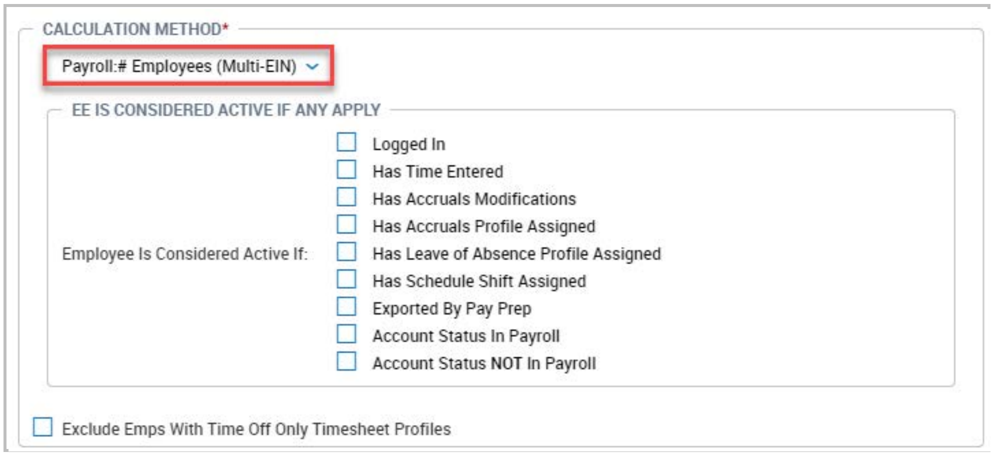


A new calculation method labeled *Payroll: #Employees (Multi-EIN)* is the primary calculation method used with the *Filter By Payroll EIN* option in the Payroll Based Generator for TLM and HR. The calculation method replicates the usage options for the *#Employees* calculation method and is functional with the *Filter By Payroll EIN* checkbox in the Invoice Generator.

Payroll: #Employees (Multi-EIN) has the following billing triggers:

- Logged In
- Has Time Entered
- Has Accruals Modifications
- Has Accruals Profile Assigned
- Has Leave of Absence Profile Assigned
- Has Scheduled Shift Assigned

- Exported By Pay Prep
- Account Status In Payroll
- Account Status Not In Payroll
- This also includes an option to *Exclude Emps With Time Off Only Timesheet Profiles*



Another new calculation method, labeled *Payroll: Marketplace ACA Timeline (Multi-EIN)*, is used as the primary calculation method used with the *Filter By Payroll EIN* in the Payroll Based Generator for the ACA Timeline. The Calculation method replicates the usage options in the *Marketplace: ACA Timeline* calculation method and is functional with the *Filter By Payroll EIN* checkbox in the Invoice Generator.

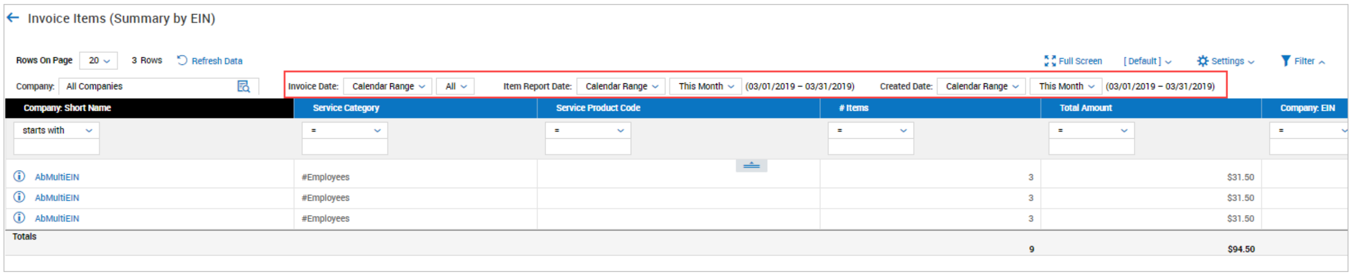
Payroll: #Employees (Multi-EIN) and *Payroll: Marketplace ACA Timeline (Multi-EIN)* capture *#Employees* across the company; not just the employees that have been processed in a single payroll.

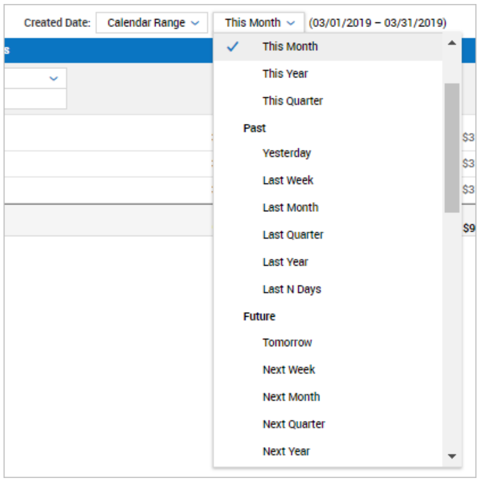
NOTE: The warning message *Filtering by payroll EIN is NOT supported* has been removed for all calculation methods that begin with Payroll, including the new calculation methods.

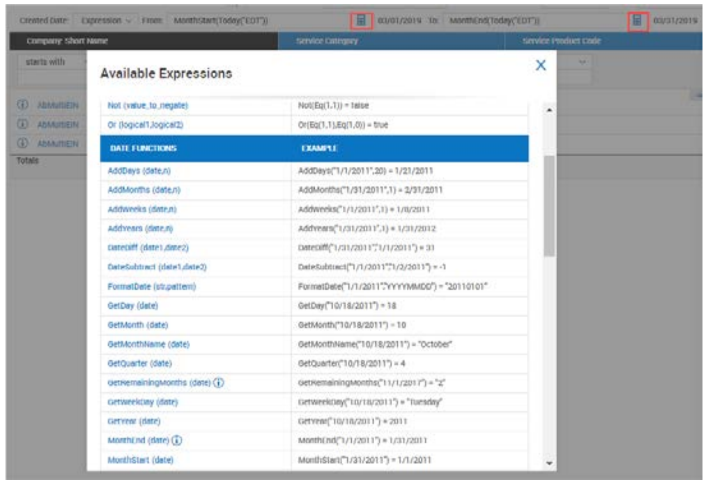
Reports: Invoice Items Summary By EIN Report Filtering Option

103882: To enable automation of the Invoice Items (Summary by EIN) report, the *Created Date* filtering option has been added to the report. The report will only contain data that pertains to the specified time spans. Time spans can be specified in three ways:

- Calendar Ranges - specify the time frame in terms of days, months or years.
- Date Ranges – include a start and end date.
- Expressions – can be used to create a custom date range.


Invoice Items (Summary by EIN)
Rows On Page 20
3 Rows
Refresh Data
Full Screen
[Default]
Settings
Filter
Company: All Companies
Invoice Date: Calendar Range All
Item Report Date: Calendar Range This Month (03/01/2019 – 03/31/2019)
Created Date: Calendar Range This Month (03/01/2019 – 03/31/2019)
Company: Short Name
Service Category
Service Product Code
Items
Total Amount
Company: EIN
starts with
AbMultiEIN #Employees 3 $31.50
AbMultiEIN #Employees 3 $31.50
AbMultiEIN #Employees 3 $31.50
Totals 9 $94.50


Created Date: Calendar Range This Month (03/01/2019 – 03/31/2019)
This Month
This Year
This Quarter
Past
Yesterday
Last Week
Last Month
Last Quarter
Last Year
Last N Days
Future
Tomorrow
Next Week
Next Month
Next Quarter
Next Year


Available Expressions
Not (value_to_negate) Not(Eq(1,1)) = false
Or (logical1,logical2) Or(Eq(1,1),Eq(1,0)) = true
DATE FUNCTIONS EXAMPLE
AddDays (date,n) AddDays("1/1/2011",20) = 1/21/2011
AddMonths (date,n) AddMonths("1/31/2011",1) = 2/31/2011
DateDiff (date1,date2)
DateSubtract (date1,date2)
FormatDate (dt,pattern)
GetDay (date) GetDay("10/18/2011") = 18
GetMonth (date) GetMonth("10/18/2011") = 10
GetMonthName (date) GetMonthName("10/18/2011") = "October"
GetQuarter (date) GetQuarter("10/18/2011") = 4
GetRemainingMonths (date)
MonthEnd (date)
MonthStart (date)

Resolved Issues

The following issues have been resolved with this release.

Error When Grouping Global Access Report

94215: When grouping by column, or using a filter within the Global Access report, located under *My Reports > System > System Utilities > Global Access*, a "Difficulty retrieving data" error displayed. This has been corrected and the error will now longer display when grouping or filtering columns.

Inconsistencies When Switching Users and Views to New UI

93562: System Administrators experienced inconsistencies when logging in as SA in Classic UI view, and then logging in as another user with the New UI enabled, and then when logging back in again as SA, the New UI view displayed for the administrator when it should have displayed the Classic UI view. This has been corrected and administrators will not experience the wrong UI loading when switching between users.

Internal System Error when Creating Charts

99401: Users are no longer erroneously receiving an internal system error when creating charts in the new UI environment.

Mobile App Users Received Security Violation Upon Login

79640: Mobile App users with the appropriate security permissions no longer receive a security violation error upon logging in to the Mobile App on a mobile phone.

Service Provider Documents Not Available for Access Control Companies

96445: Service Provider Documents (*Our Company > Service Provider Documents*) are now available for System Administrators and users with the appropriate security permissions (Download Service Provider Documents security item enabled in Security Profile) in an Access Control company.

.hcm User Logout Reason Undefined

96630: When working in the New UI, users were sometimes logged out without warning. When working in the New UI, logouts will be consistent with the Classic UI.

.hcm Redirects to .home

96595: When working in the New UI, using the .hcm URL, users were randomly redirected to the .home URL. Moving forward, users will no longer be redirected to the .home pages.

Autorotation on IPhone

101576: Some customers may experience problems with autorotation when the New Mobile app is launched on some IOS devices. The problem is limited to the initial splash screen. On the login page and all additional pages, autorotation will work correctly.

View Supporting Invoice Icon for Invoices (New UI)

98365: The *View Supporting Info* icon is now available in the New UI using the *View Invoice* option under *Company Settings > System > Invoices*.

Time and Labor Enhancements

InTouch Clocks

Employee Information Updates

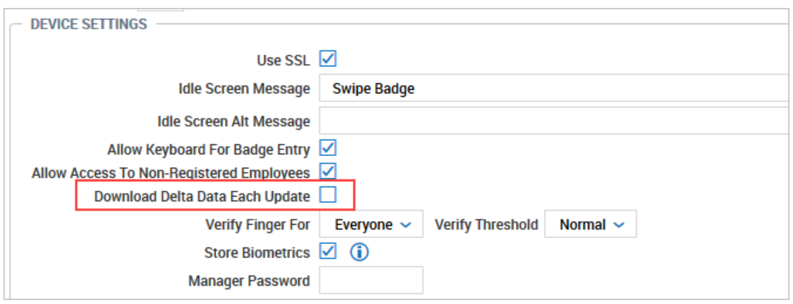
85846: A *Download Delta Data Each Update* option now appears on the terminal screen for InTouch clocks. When this option is enabled, the clock will only send new employee additions or deletions during UPLOAD ALL SETTINGS commands and REPROGRAM (URGENT) commands. In the past, full updates were made each time these commands were executed.

Regardless of the setting of the Download Delta Data Each Update, a full update will occur under these conditions:

- A manual, non-urgent REPROGRAM command is started.
- The previous update failed for any reason.

Any change of InTouch hardware settings on Employee Information will send a Full Update to the clock.

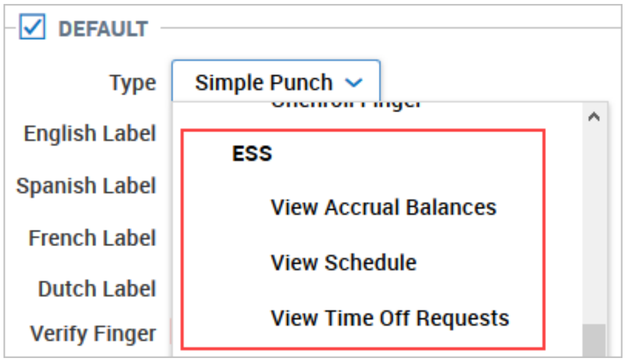
The new option is available in the *Device Settings* section of the *Terminal Configuration* widget when editing terminals from *Company Settings > System > Terminals (External)*.

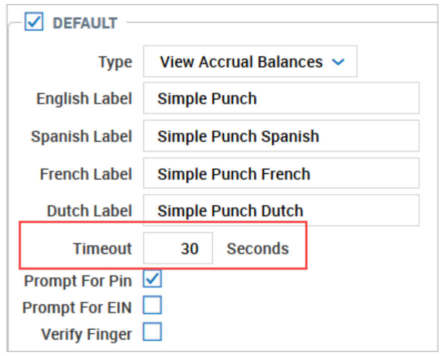


A new form, *Terminal Accounts*, is available on the InTouch installation page to show the current accounts on the device. Within the system, employee accounts can be viewed from *Company Settings > System > InTouch Installations*. After clicking the Edit Middleware icon, the Middleware Installation page for the clock is displayed.

ESS (Smart View) Timeout Threshold

21151: The timeout threshold for ESS functions on InTouch clocks is now configurable. The minimum timeout is 30 seconds and the maximum timeout is 180 seconds. The system will adjust to the minimum or maximum value if you enter a value that is out of range. ESS function settings are found under *Company Settings > System > Terminals (External)*. Click on the *Edit Terminal* icon in the clock's row. When the *Edit Terminal* page appears, scroll down to the *Device Settings* widget and select an ESS function from the *Type* drop-down in the *Default* section. Enter the number of seconds for the timeout in the Timeout option box.



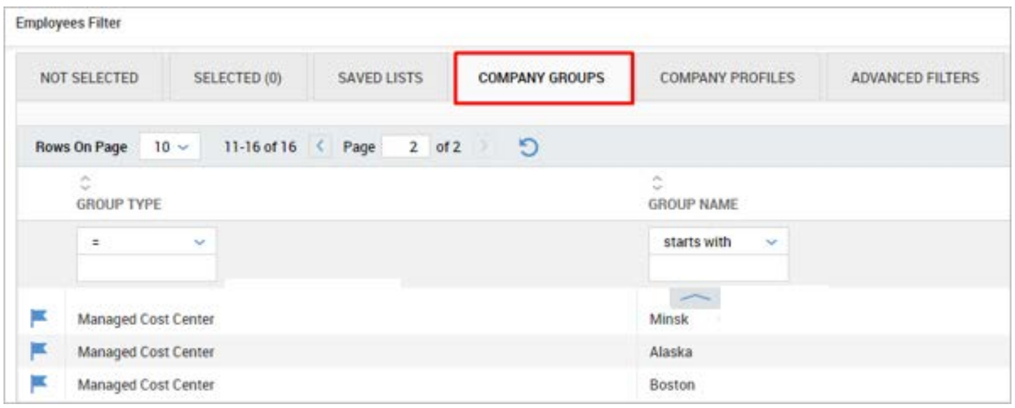


Managed Cost Centers (MCC)

The following enhancements have been added for Managed Cost Center functionality.

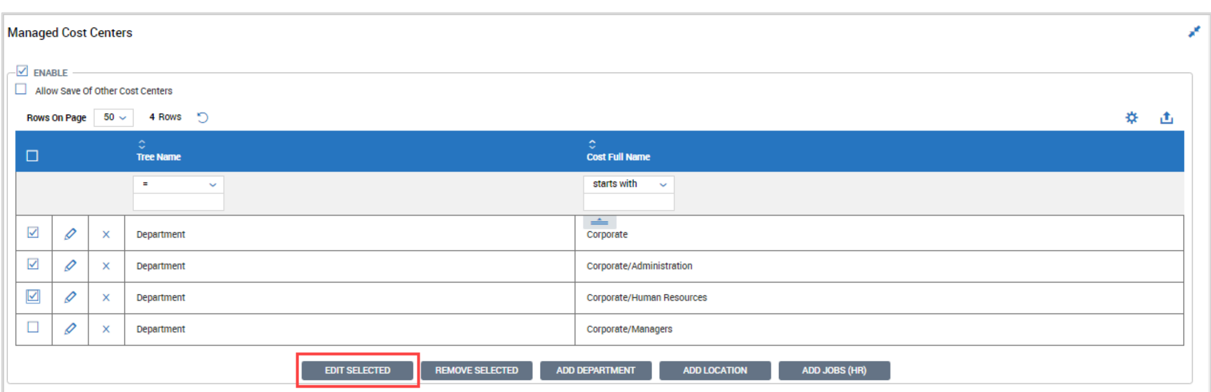
Employees Filter: Managed Cost Center (MCC) Groups Added to Filter

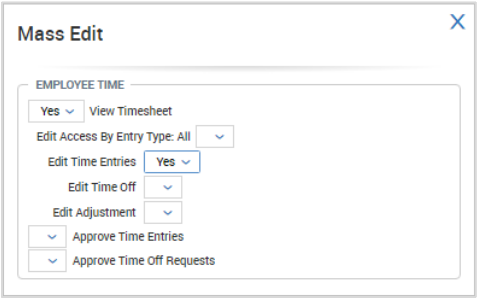
86289: In the system, anywhere employees can be selected via an Employees Filter, Managed Cost Centers can now be selected under the *Company Groups* tab.



Mass Edit of Cost Centers in Managed Cost Centers Widget

89630: Within the *Managed Cost Centers* widget of employee accounts, we have added an ***Edit Selected*** button, which allows users to select multiple cost centers, click the button, and then edit the settings in mass for all selected cost centers at the same time.





Reports: MCC Managers Allowed to View Time Worked in Their Cost Centers

9286, 83937, 83938, 83939, 83928: Cost center managers will now be able to view time reports if one of their employees has time worked in the cost centers they manage.

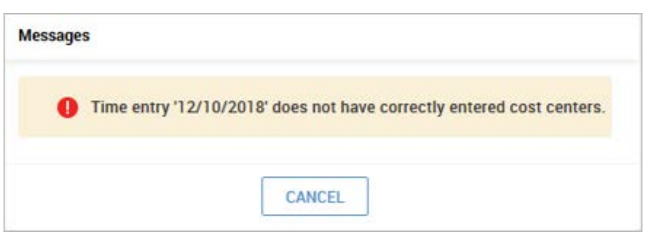
For example, employee John Smith works in CC1. John's manager, Manager 1, manages CC1 and is now able to see John's time allocated to CC1 on any time report. Previously, cost center managers like Manager 1 did not have access to reports if those reports contained cost centers they did not manage. Now, these managers can access these time reports, but will only be able to view entries for the cost centers they manage. They will not see entries containing cost centers they do not manage.

The following reports are affected in this release:

- **Calculated Time Summary By Week (Time Entries)**, located under: *My Reports > Time & Labor > Calculated Time > Calculated Time Summary By Week (Time Entries)*
- **Calculated Time By Work Day (Counters)**, located under: *My Reports > Time And Labor > Calculated Time > Calculated Time By Work Day (Counters)*
- **Calculated Time Summary By Week (Counters)**, located under: *My Reports > Time And Labor > Calculated Time > Calculated Time Summary By Week (Counters)*
- **Calculated Time By Calendar Day (Counters)**, located under: *My Reports > Time and Labor > Calculated Time > Calculated Time By Calendar Day (Counters)*
- **Detailed Corrected Time (Counters)**, located under: *My Reports > Time And Labor > Calculated Time > Detailed Corrected Time (Counters)*

Warning Message Added to Timesheets for Non-Managers of Cost Centers

78732: Previously, managers who made edits to timesheet cost centers for which they did not manage, were able to make and save the edit without being notified they were using cost centers that were outside their authority to use. We have now added a warning message for these situations. Managers will be notified their cost centers were entered incorrectly. They will not be allowed to bypass the message and must correct the cost centers and only use the cost centers they manage before the edit can be saved.

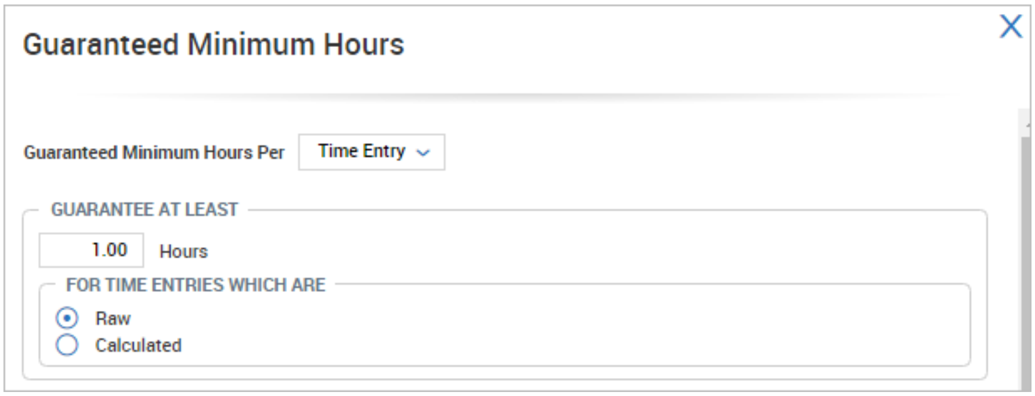


Pay Calculations 2.0

Guaranteed Minimum Hours Rule Updated

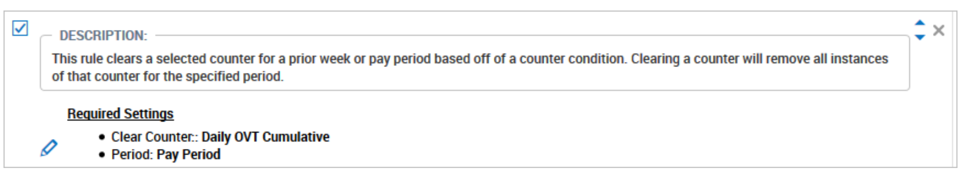
88428: For Pay Calculations 2.0 companies, when the ***Guaranteed Minimum Hours*** rule was set to ***Time Entry***, the rule defaulted to calculating time entries which were already calculated (i.e., rounding, lunch/break deductions taken, etc.) We have now updated the rule to allow users to select raw or calculated time.

We have added a ***For Time Entries Which Are*** section, and you can now select ***Raw*** or ***Calculated***. The *Raw* option will process time entries prior to other calculations being applied (i.e., rounding, etc.) and the guaranteed hours being added. The *Calculated* option will process time as it did previously.

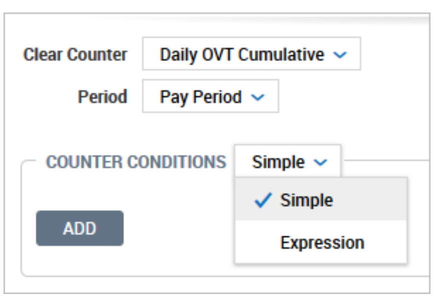


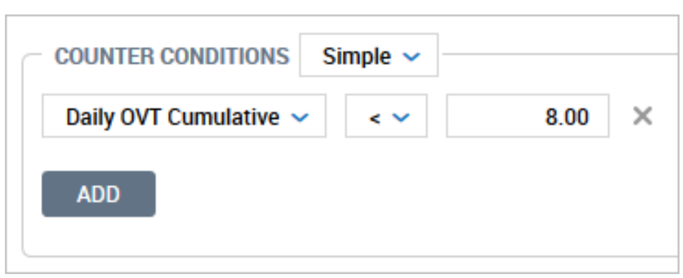
Clear Counter Rule

94016: Oregon laws state that in manufacturing, if an employee works earns both daily and weekly overtime in a week, the employee must be paid the greater of the daily overtime or weekly overtime. To enable the implementation of this rule, a new Clear Counter Rule is now available in Pay Calc 2.0. The rule includes expressions that can be used to compare counters and clear counters if needed.



The rule clears the counter for a prior week or pay period based off the *Period* setting. The rule determines whether to clear the counter using *Simple* counter conditions or *Expressions*. A simple condition might compare an existing counter value to a constant as shown below.





An expression may contain nested functions. Variables in the expression are defined at the bottom of the list and may include other counters.

Available Expressions

COMPARISON AND LOGIC FUNCTIONS	EXAMPLE
Eq (text1,text2)	Eq("1", "1") = true
If (test_value,value_if_true,value_if_false)	If(Eq(1,1),"10","20") = 10
In (val_to_find,in_val1,in_val2,...,in_valN)	In("10","5","10","20") = true
Max (num1,num2)	Max(50000,60000) = 60000
Min (num1,num2)	Min(50000,60000) = 50000
Not (value_to_negate)	Not(Eq(1,1)) = false
Or (logical1,logical2)	Or(Eq(1,1),Eq(1,0)) = true
DATE FUNCTIONS	**EXAMPLE**
AddDays (date,n)	AddDays("1/1/2011",20) = 1/21/2011

VALID VARIABLES	DESCRIPTION
DailyOVT_46219264	Counter: Daily OVT
DailyOVTCumulative_46219520	Counter: Daily OVT Cumulative
WeeklyOVT_46219776	Counter: Weekly OVT
WeeklyOVTCumulative_46220032	Counter: Weekly OVT Cumulative

To use this rule to enforce the Oregon laws, do the following:

- Create Daily and Weekly Overtime Counters
- Copy the counters to Cumulative Counters
- Use the *Cumulative By Day* rule to store the totals in the Cumulative counters daily.
- Add rules to clear each counter. There will be two rules. The first rule will include an expression in the condition, used to clear the weekly overtime counter if the accumulated weekly overtime is less than the accumulated daily overtime. The second rule will clear the daily overtime counter if the accumulated daily overtime is less than the accumulated weekly overtime.

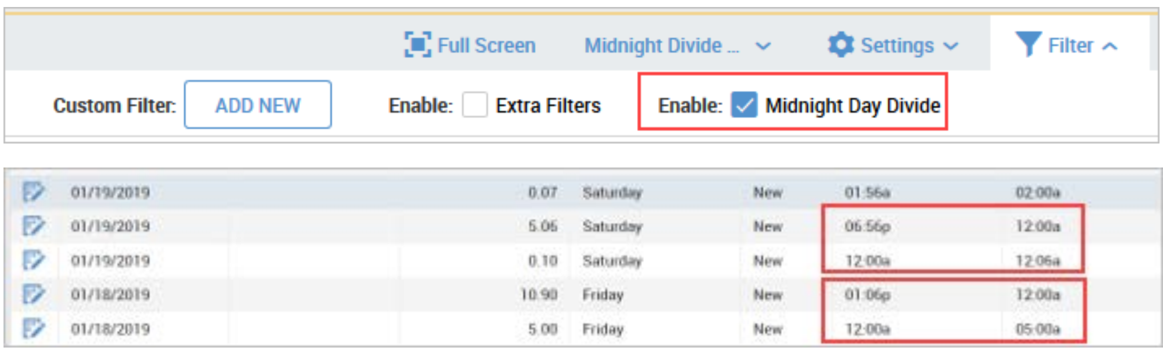
Reports

The following enhancements have been completed for reports.

Midnight Day Divide in Detailed Hours Report

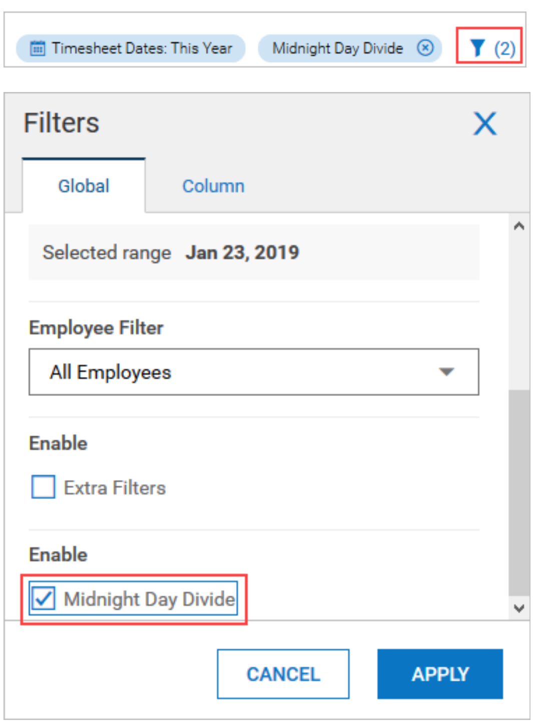
89745: The Department of Health Care Services in California requires employers to report employee hours worked for health care services on a calendar day basis with a midnight day divide. To accommodate this requirement, a filtering option has been added within the *Detailed Hours* report under *My Reports > Time Reports > Time Allocation* to enable the Midnight Day Divide split. When this option is used, the report will show two shifts when a shift crosses midnight.

Classic UI



New UI

For users of the new UI, click on the Filter icon to enable or disable the *Midnight Day Divide* option for the report.

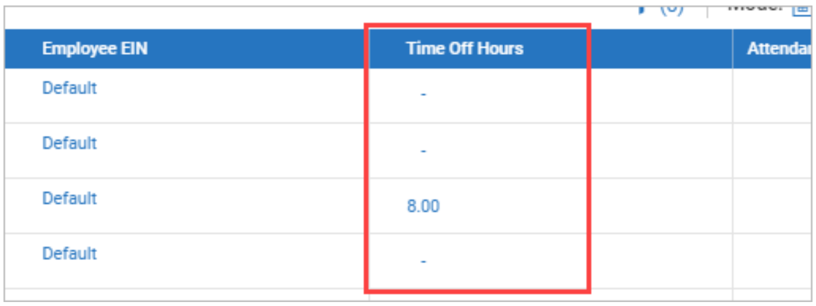


Time Off Hours Pop-Up Added to Attendance Board Report

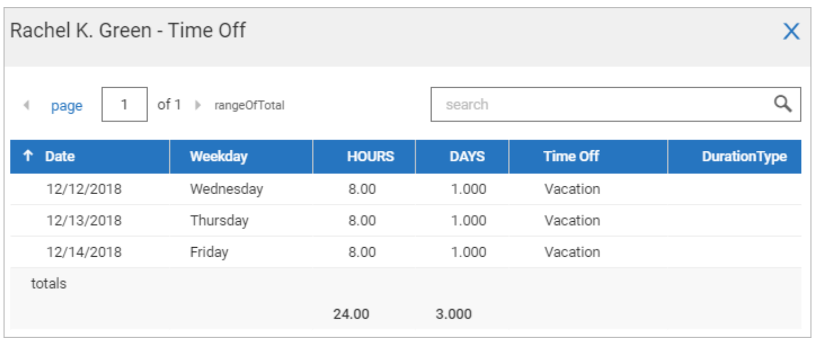
83856: In the New UI, the data within the *Time Off Hours* column of the *Attendance Board* report will now be presented as a selectable hyperlink. When clicked, a pop-up will display showing time off details.

The report can be accessed in the following places:

- *My Info > My Reports > Time Reports > Time Allocation > Attendance Board*
- *My Team > Time > Reports > Time Allocation > Attendance Board*



Employee EIN	Time Off Hours	Attenda
Default	-	
Default	-	
Default	8.00	
Default	-	



Rachel K. Green - Time Off

page 1 of 1 rangeOfTotal

search

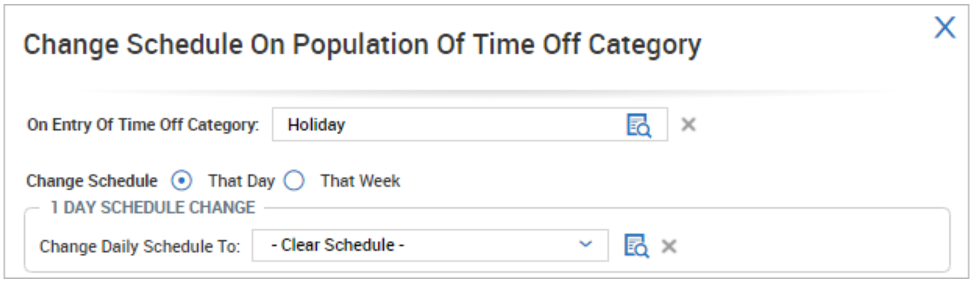
Date	Weekday	HOURS	DAYS	Time Off	DurationType
12/12/2018	Wednesday	8.00	1.000	Vacation	
12/13/2018	Thursday	8.00	1.000	Vacation	
12/14/2018	Friday	8.00	1.000	Vacation	
totals		24.00	3.000		

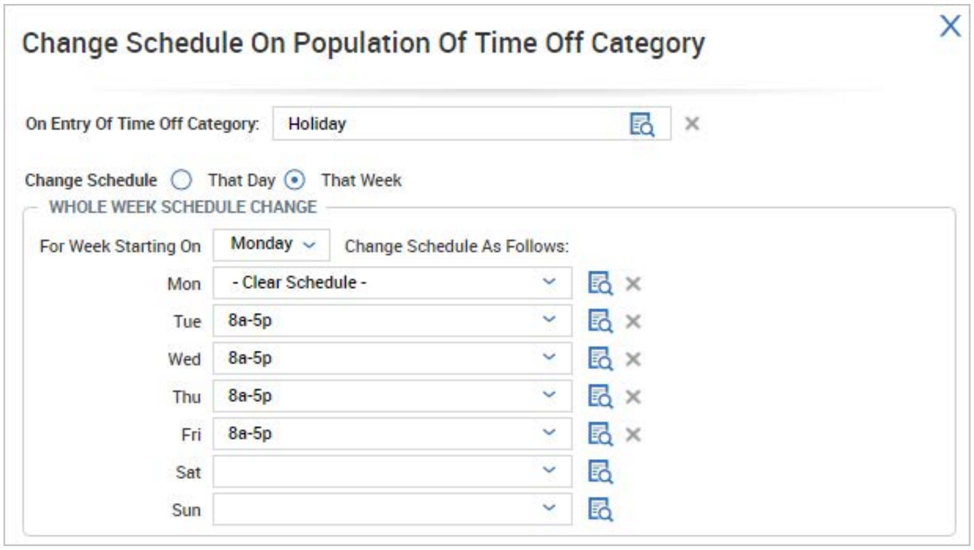
Timesheet Rules: New Rule Added to Clear Employee Schedule on Auto Population of Holidays

92029: To assist companies in clearing or changing employee schedules containing auto-populated holidays or other time off categories, a new ***Change Schedule On Population Of Time Off Category*** timesheet rule has been added. This rule will be available under the *On Populate* category.

Timesheet profiles are located under *Company Settings > Profiles/Policies > Timesheets*. After selecting a profile, rules can be added by clicking the *View/Edit Rules* button, and then clicking the *Add Rule* button.

The rule will allow users to define specific time off categories for which the rule should be applied. The schedule can be changed or cleared for the day of the auto-populated time off entry, or the schedule can be changed or cleared for specific days of the week.





Announcements & Announcement Notification Added to TLM Companies

65758: Previously, *Announcements* were only available in HR Companies. We have now added this functionality to TLM companies. If a company has the TLM, HR or HR SBE sub-systems enabled, both

Announcements and the *Announcement Created* notification will be available.

Daily Rule Name Length Increased

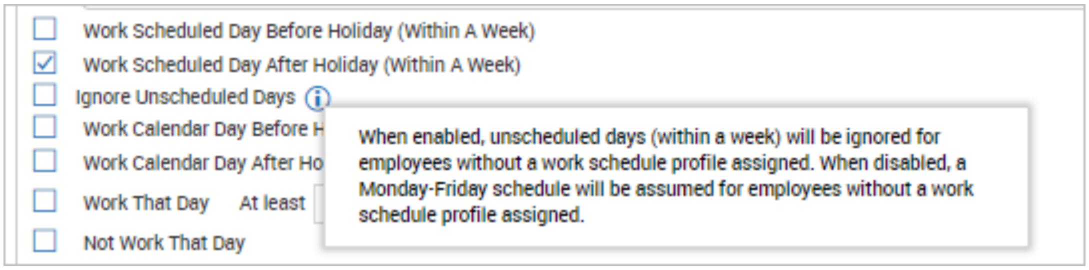
100287: The daily rule name length has been extended to 60 characters. Previously, daily rule names were limited to 40 characters. Daily rule names are defined *Company Settings > Profiles/Policies > Schedules > Daily Rules*.

Pay Calculations 2.0

Holiday Eligibility for Employees with Irregular Schedule Cycles

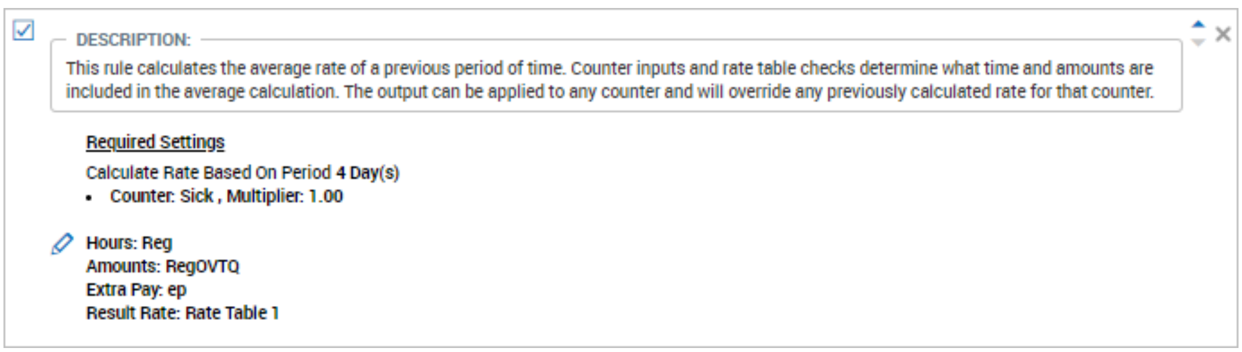
94455, 108062: For employees without a Work Schedule profile assigned in their employee information, the *Holiday Eligibility (V.2)* rule in Pay Calculations 2.0 had always assumed the employee had a Monday through Friday schedule. The Monday through Friday schedule was used in conjunction with the *Worked Scheduled Day Before Holiday (Within A Week)* and *Worked Scheduled Day After Holiday (Within A Week)* settings to determine if the employee was eligible for holiday pay.

Schedules for some employees vary from week to week. To simplify holiday pay eligibility for these employees, a new option *Ignore Unscheduled Days* option has been added. When enabled, the unscheduled days within a week will be ignored for employees who do not have a Work Schedule profile assigned; when unchecked, the rule will continue to assume a Monday through Friday schedule.



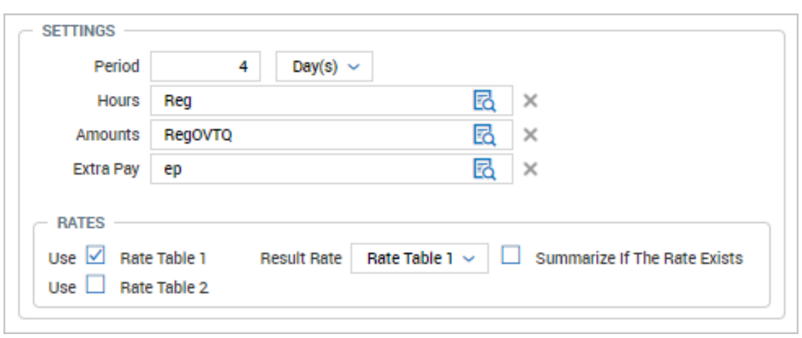
California Paid Sick Leave – Calculate Rate Based On Average of Previous 90 Days

38926: Under the paid sick leave law in the state of California, an employer must pay an employee for paid sick leave at an employee's regular rate of pay, either for the workweek in which the paid sick leave was taken, or as determined by averaging over a 90-day period. To comply with this regulation, a new rule called *Calculate Rate Based on Period* is now available in Pay Calculations 2.0.

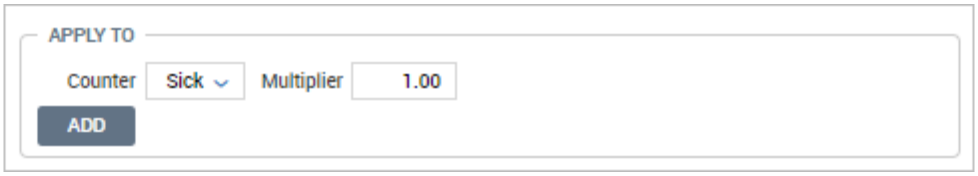


To set up the calculation of the average rate, first specify the period of time used to include previous pay rates. The period of time can be specified in days, weeks, months or pay periods. The average rate will be calculated based on the time worked during that period (Hours) and the amount (Amounts) and quantity (Extra Pay) earned. For Hours, Amounts and Extra pay, select counters or lists of counters that should be included in the average rate calculation. The amount earned over the period of time will be the totals of the Amounts and Extra Pay counters, multiplied by the rates in effect at that time.

The average rate will be the totals of counters in the Amounts + Extra Pay divided by the total Hours.



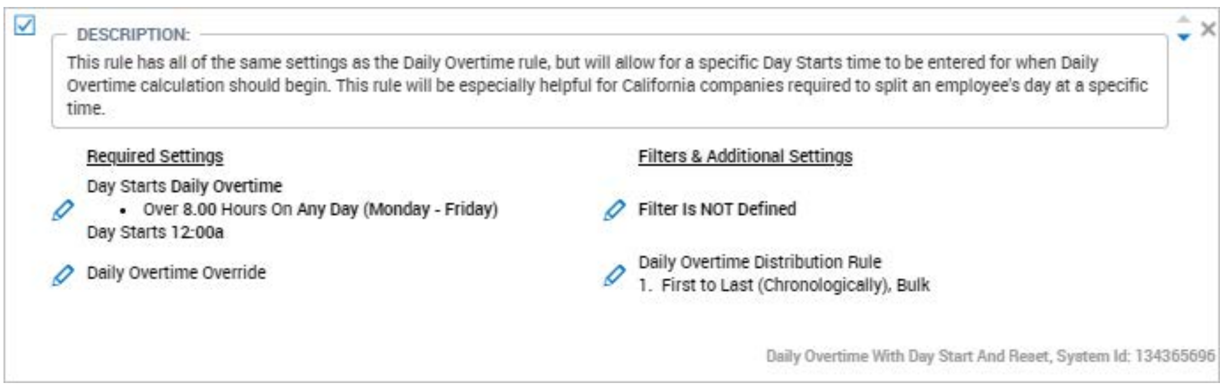
The calculated amount will be added to the counter.



Daily Overtime with Day Start Reset Rule Added

27633: Companies in California are required to split an employee's day at a specific time of day. When an employee's shift crosses over the start of the next day, the daily overtime calculations need to be reset, and the remaining hours in the shift count toward the new day's totals. The *Daily Overtime with Day Start & Reset* rule has been added to Pay Calculations 2.0 for this purpose. Using this rule, you can define the time of day when the calculation of daily overtime begins.

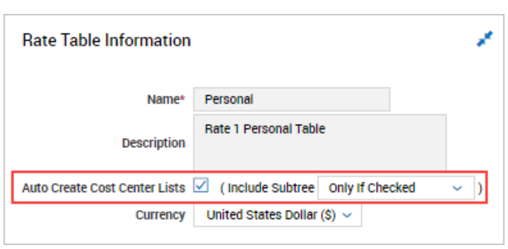
This rule is similar to the Daily Overtime rule, except that the *Day Starts* option defines when to begin accumulating hours for a daily total.



In this example, the day starts at midnight and any more than 8 hours worked on Monday through Friday are counted toward overtime. If the employee worked from 3:00 PM Monday until 1:00 AM on Tuesdays, the hour between 11:00 PM and 12:00 AM would count towards daily overtime, but the calculations would be reset at midnight. The hour between midnight and 1:00 AM on Tuesday would be considered part of the total hours worked on Tuesday.

Rates: Mass Edit Auto Create Cost Center Lists Moved

103880: The *Auto Create Cost Center Lists* option in employee rate tables is used to add cost center limit lists that are maintained by rate tables.

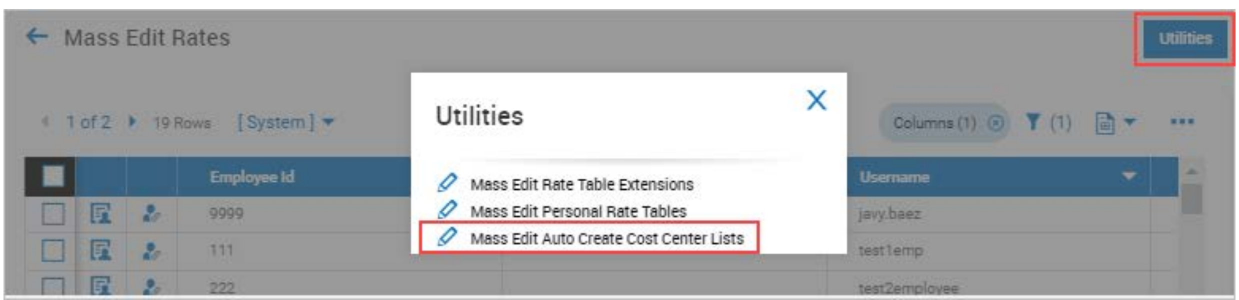


Mass editing of the *Auto Create Cost Center Lists* option was previously available in the *Misc. Fields* widget when mass editing employee account settings. Combining this option with other Employee Information fields presented some problems for users. From this widget, it was not possible to determine which employees had rate tables assigned, or to see the *Include Subtree* options.

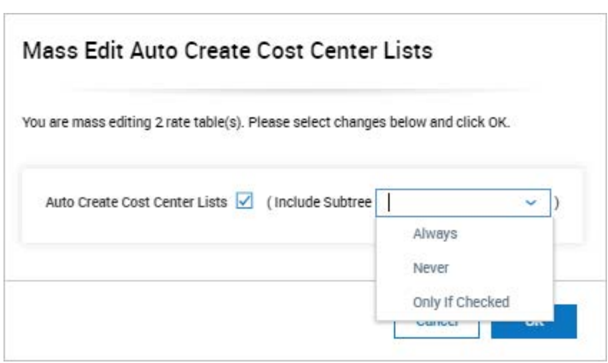
Because the auto creation of cost center lists is a rate table feature, the mass editing of this option has been moved. In the Classic UI, the option is available under *My Employees > Employee Maintenance > Rates > View Employee Rate Tables*. In the New UI Desktop experience, the option is available under *ADMIN > Company Settings > Mass Edit > Mass Edit Rates*. Either of these options displays a report with two new optional features: *Auto Create Cost Center Lists Enabled* and *Include Subtree*. When added to the report, it's easy to determine if the automatic creation of cost center lists is enabled for an employee's rate table and what options for *Include Subtree* were selected, making it clearer which employees should be included in the mass edit.

Employee Status		Rate Table Name	Auto Create Cost Center Lists Enabled	Include Subtree
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked
Active		Rate 1(Rate Table 1): Personal	Y	Only If Checked

Once employees are selected, the Mass Edit Auto Create Cost Center Lists utility can be used to make the updates.

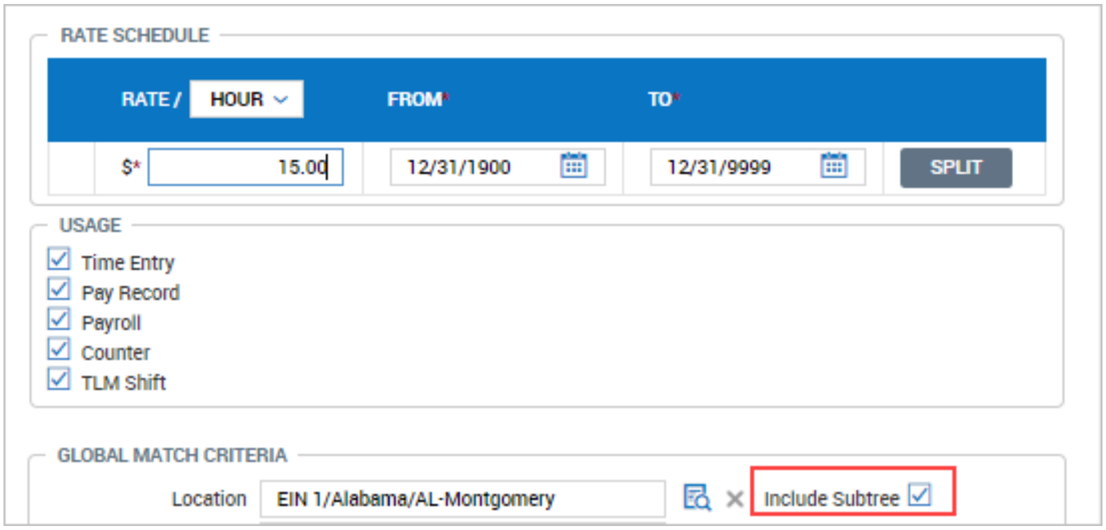


103870: When *Auto Create Cost Center Lists* is enabled, the *Include Subtrees* option is also available.



When mass editing the rate tables, there are three options for the *Include Subtree* drop-down:

- Always – This option will always apply the rate to the cost center and any of its children.
- Never – The rates will never be applied to any of the cost center's children.
- Only If Checked – The rates will be applied if the *Include Subtree* option that is selected within the rate itself.



Reports

MCC Managers Allowed to View Time Worked in Their Cost Centers

79289, 78823, 79275, 79278: Cost center managers can view time reports if one of their employees has time worked in the cost centers they manage.

For example, employee John Smith works in CC1. John's manager, Manager 1, manages CC1 and is now able to see John's time allocated to CC1 on any time report. Previously, cost center managers like Manager 1 did not have access to reports if those reports contained cost centers they did not manage. Now, these managers can access these time reports, but will only be able to view entries for the cost centers they manage. They will not see entries containing cost centers they do not manage.

The following reports are affected in this release:

- **Calculated Time By Entry (PC1)** – located under:

  Classic UI - My Reports > Time & Labor > Calculated Time Summary By Entry

  New UI - *My Reports > Time Reports > Calculated Time > Calculated Time By Entry*

- **Detailed Hours – l**ocated under**:**

  Classic UI - *My Reports > Time & Labor > Time Allocation > Detailed Hours*

  New UI - *My Reports> Time Reports > Time Allocation > Detailed Hours*

- **Calculated Time By Calendar Day (TE) –** located under:

  Classic UI **-** *My Reports > Time & Labor > Calculated Time > Calculated Time By Calendar Day*

New UI - *My Reports > Time Reports > Calculated Time > Calculated Time Summary > Calculated Time By Calendar Day*

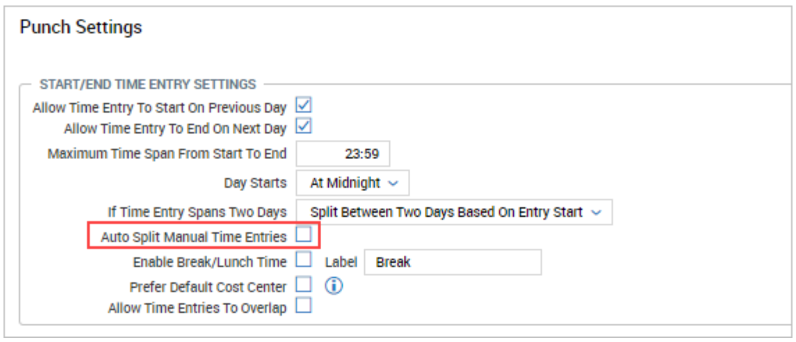
- **Calculated Time By Work Day (TE)** – located under:

  Classic UI - *My Reports > Time & Labor >Calculated Time > Calculated Time by Work Day*

  New UI - *My Reports > Time Reports > Calculated Time > Calculated Time Summary > Calculated Time By Work Day*

Start/End (All Days) Timesheet Profile: Auto Split Setting

104005, 104006: For customers migrating to the New UI who need to split time entries that cross the day divide, a new option is available in Start/End (Add Days) timesheet profiles. When *If Time Entry Spans Two Days* is set to either *Split Between Two Days Based On Entry Start* or *Split Between Two Days*, the *Auto Split Manual Time Entries* option appears.



In previous releases, the *Split Between Two Days* and *Split Between Two Days Based On Entry Start* applied only to raw punches. In this release, when either of those options are selected, the time entries will be split on all timesheet tabs for both raw punches and manual entries, including:

- Timesheet
- Calc. Details
- Counters
- Summary By Day
- Shift Premium Summary

105388: Previously, users were only able to automatically split time entries across the day divide using the Start/End (All Days) With Auto Splits timesheet profile. This new feature provides the same capabilities. Consequently, the Start/End Timesheet (All Days) With Auto Splits profile is no longer available as an option when creating new timesheet profiles.

Timesheet, Time Entry and Time Off (New Mobile App)

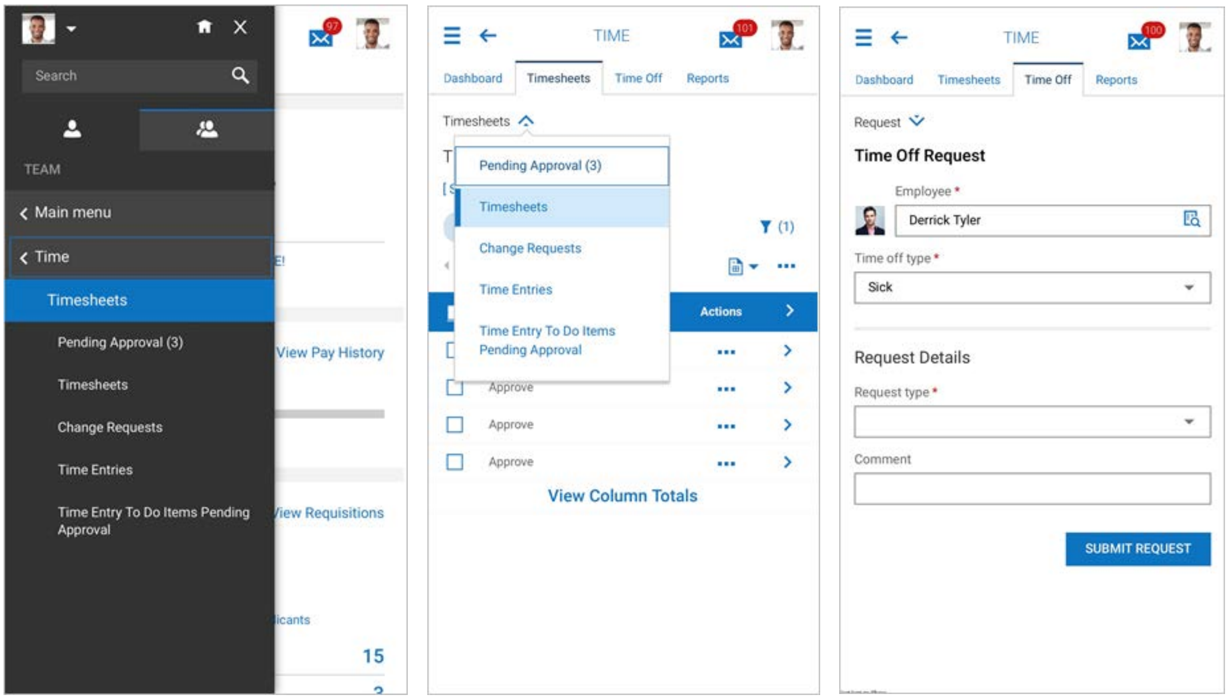
For managers using the mobile app, access to timesheets, change requests and time entries has been simplified. Review and approval tasks that are completed by TLM managers are now grouped together under the *TEAM > Time > Timesheets* menu item. Similar menu changes provide simplified access to timesheets for employees under *MY INFO > My Time > Timesheet*.

NOTE: Navigation using the Classic UI or New UI Desktop experience has *not* changed.

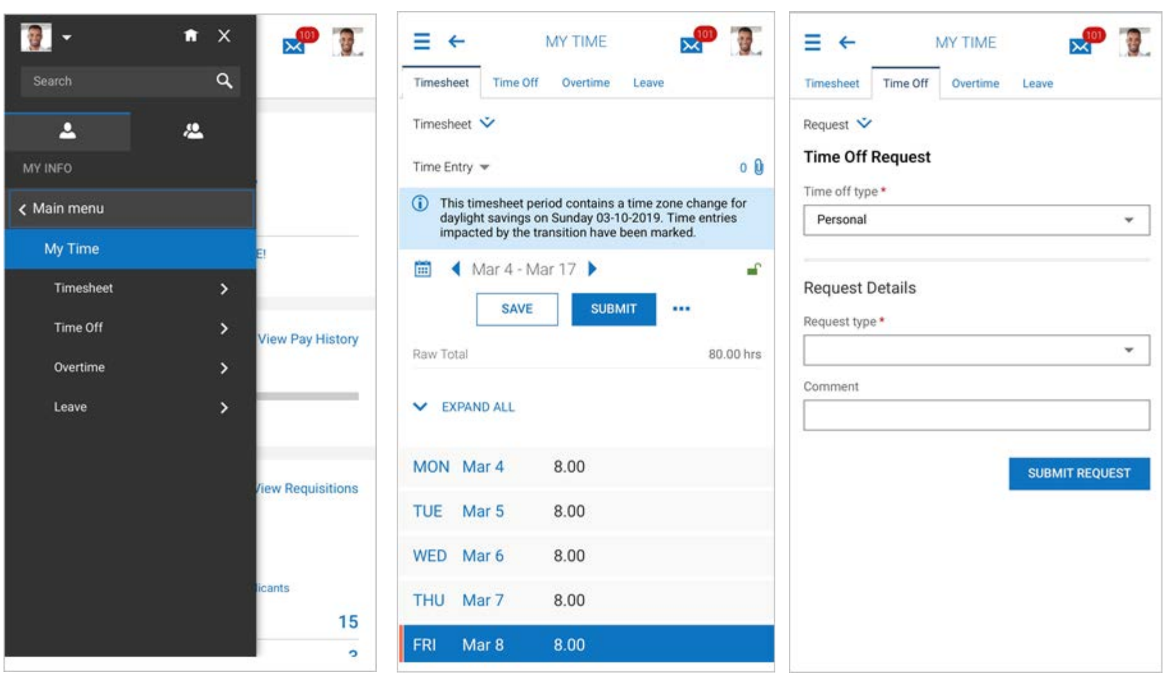
97662, 97657, 96599: The drop-down on the *Timesheets* tab provides access to *timesheets that are pending approval, open timesheets, change requests, time entries* and a new report*, Time Entry To Do*

Items Pending Approval, which shows how many open Time Entry To Do items are assigned to a manager. From the *Time Off* tab, managers can view employees' time off requests.

Manager Access

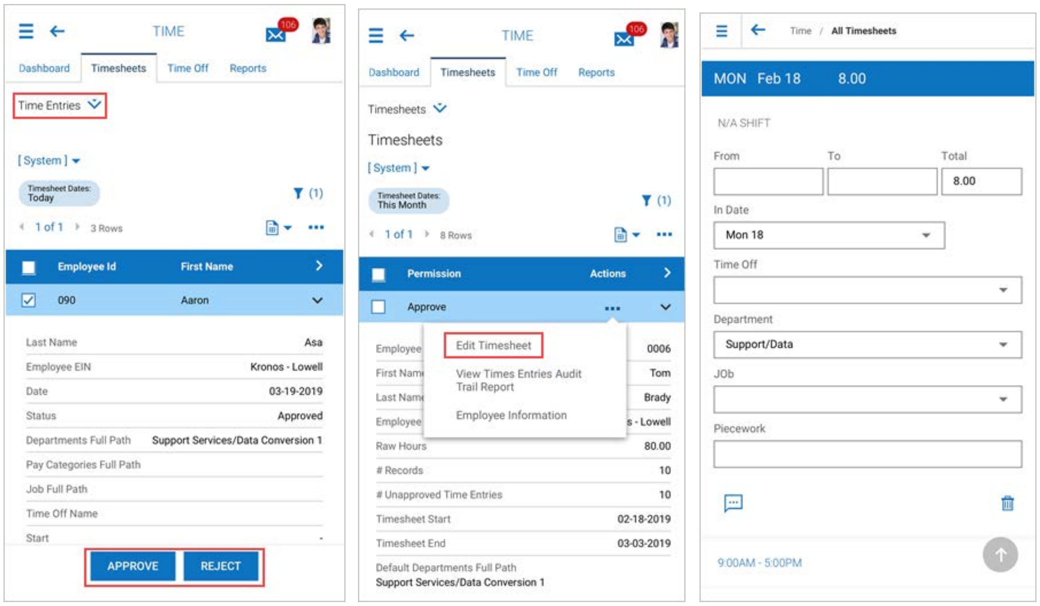


Employee Access



Time Entries (New Mobile App)

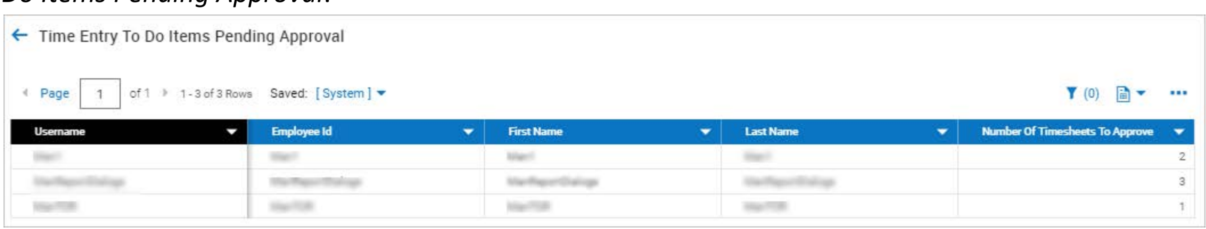
99251, 97234, 99600: By selecting *Time Entries* on the *Timesheets* tab, managers can edit, approve or reject time entries for their employees, employees with time entries in their managed cost centers or employee with time entries who belong to a company group that they manage. From the timesheets tab, they also have access to edit timesheets in the mobile app.

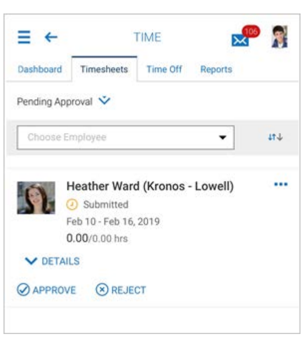


In the New Mobile App, timesheets and time entries can be found under *TEAM > Timesheets*.

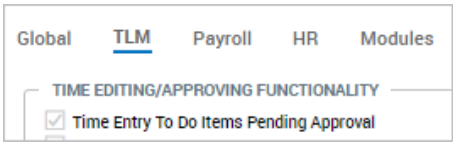
Pending Time Entry To Dos Report (New Mobile App and New UI Desktop Experience)

99236: The new *Time Entry To Do Items Pending Approval* report displays pending time entry To Do Items requiring manager approval. The report displays the manager's employee id, first name, last name and the number of timesheets requiring approval by the manager. In the New UI Desktop experience and New Mobile app, the report is accessed from *Team > Timesheets > All Timesheets > Time Entry To Do Items Pending Approval*.



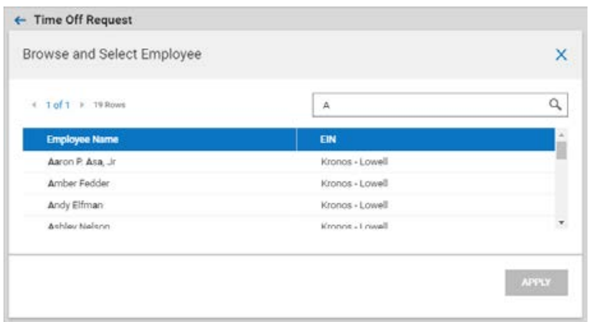


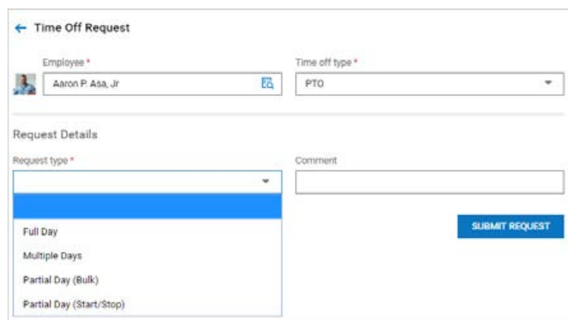
Users must have permission to view *Time Entry To Do Items Pending Approval* in their security profiles.



Time Off Requests (New UI Desktop Experience)

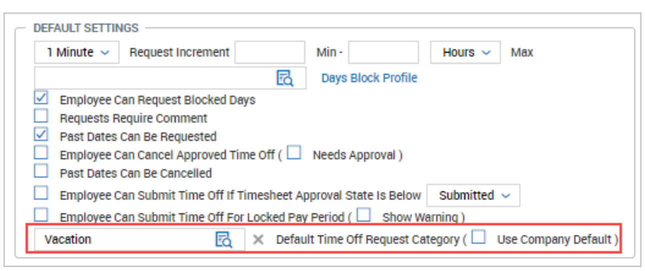
99885: After selecting an employee for a time off request, the name and picture of the employee are displayed. This eliminates the need to toggle back and forth to verify which employee was selected. Once selected, default values from the employee's Time Off Planning profile are loaded on the time off screen. Additional details and comments about the request can be added after the employee and *Time off type* have been selected.





Time Off Requests: Default Time Off Request Category (New UI Desktop and New Mobile App)

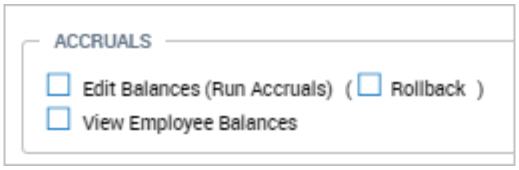
99882: Within Time Off Request profiles, a new option allows you to select a *Default Time Off Request Category*. When company defaults for Time Off Request profiles are defined and the *Use Company Default* option is checked, the request is automatically populated with the time off category. If an employee is assigned a profile that contains a different *Default Time Off Request Category,* it will be used in the request. If an employee does not have permission to set a time off category or none is set in the *Default Time Off Request Category*, the request Time Off category will be blank when the request is created.

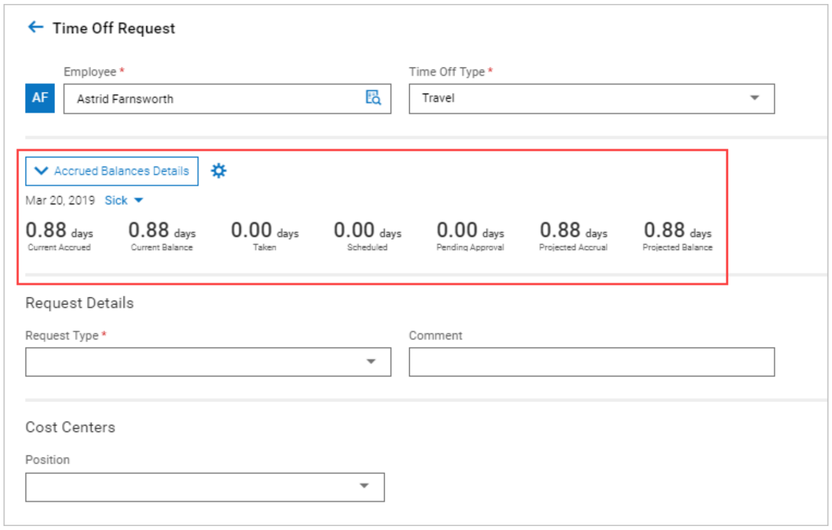


Show Accrual Balances in Time Off Requests (New UI Desktop and New Mobile App)

99890: Employees and managers can now see accrual balances in the New UI when viewing time off requests. Accrual balances can be displayed in days or hours, depending on what is selected from the drop-down under the icon next to *Accrued Balance Details*. To see the accrual balances, users must have permission to view accrual balances in their security profiles.

If the user selects a time off that is tied to an accrual policy, the accrual balances for that time off type will be available in the *Accrual Balances Details*.



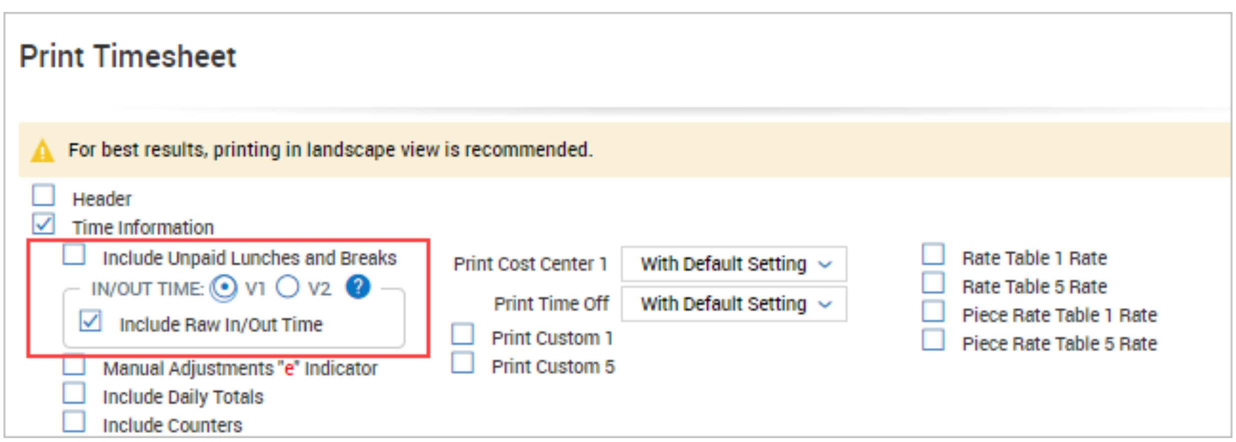


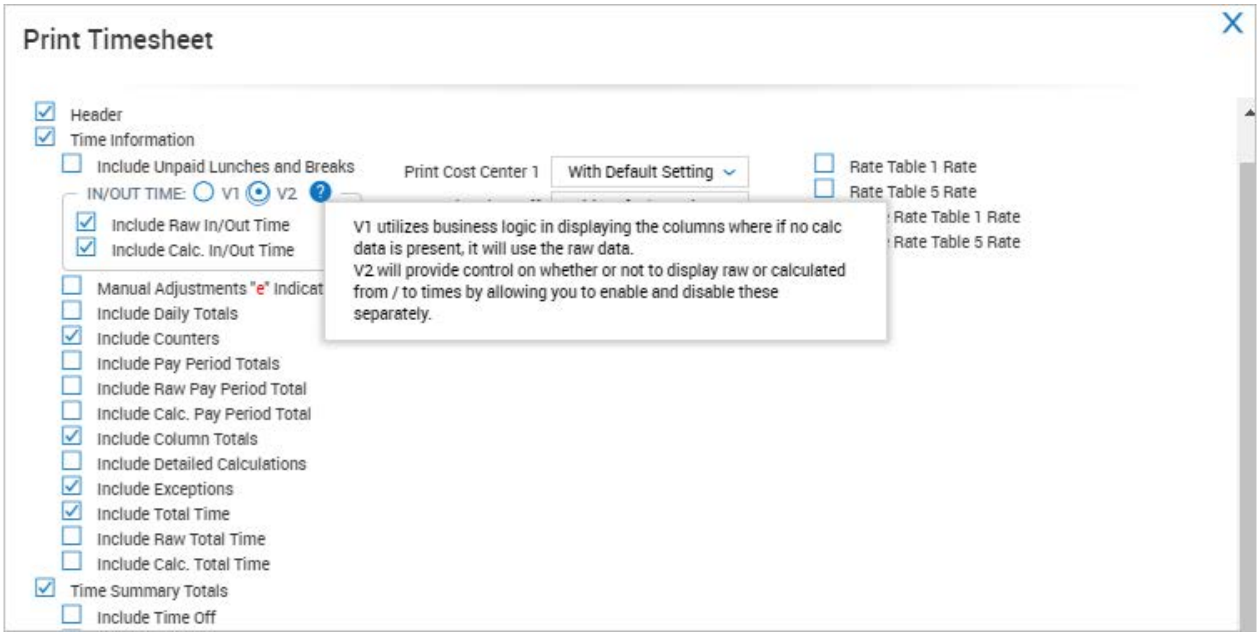
The balances display can be swiped to the left or right in order to view all balances on mobile devices.

Print Option to Exclude Calculated Total Time and Punches When Printing Timesheets

102173: In previous releases, calculated time and punches could not be hidden when printing timesheets. This was a compliance issue in some countries where only raw punches and raw time could be provided to employees. New options have been to exclude calculated data from the output.

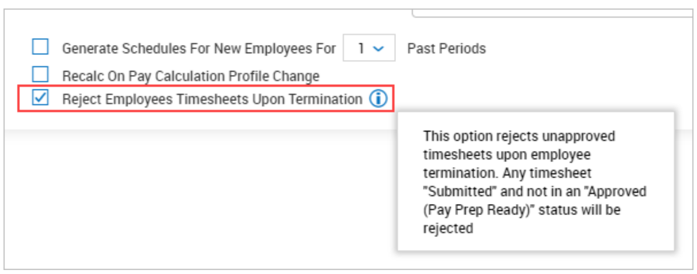
The *In/Out V1* and *V2* options control whether or not calculated totals can be included when printing a timesheet. The V1 option will output raw data if no calculated data is available. The *V2* option allows the user to determine whether raw, calculated or both kinds of data are output.





Timesheet Rejection Upon Termination

108738: Previously, timesheets that were not in an *Approved(Pay Prep Ready)* state were automatically rejected upon employee termination. This was a problem in companies where multiple levels of timesheet approvals, sometimes spanning a week or longer, were required. The *Reject Employees Timesheets Upon Termination* setting makes the automatic rejection of timesheets optional. It is checked by default.



This setting can be found in the *Account Settings* widget under *Company Settings > Global Setup > Company Setup*, on the Global Policies tab. If the *Account Settings* widget is not present, it can be added using *Edit Tabs*.

Resolved Issues

The following issues have been resolved with this release.

Removing Workday Breakdown

107717: The *Allow Workday Breakdown* field will not be included on the employee's *Profiles* widget if it is not enabled under *Company Setup*. Previously, when *Allow Workday Breakdown* was not enabled, it was still displaying on the employee's *Profiles* widget.

Time Off Calendar Showing Accrual Balances (New UI Desktop Experience)

104875: Managers will not be able to see an employee's accrual *Current Balance* in the *Time Off Calendar* if they have neither *Edit Balances* nor *View Accruals Balances* security permissions enabled. Previously, in the New UI and the New Mobile App, managers who didn't have security permissions to see an employee's accrual *Current Balance* in the *Time Off Calendar* were still able to see the accrual *Current Balance*.

Manager Cannot See All Time Entries Report When Managed Cost Center is Moved

102390: If a cost center moves, the manager of that cost center, if they have the correct security permissions, will still be able to view employee punches in the employee's *All Time Entries* report whether the *Show My Timesheets Only* box is checked or not. Previously, when a manager's cost center was moved, and the manager was assigned to the newly moved cost center with the *View Timesheet*, *Edit Access By Entry Type: All,* and *Approve Time Entries* security permissions enabled, the manager was not able to view employee punches in the *All Time Entries* report with the *Show My Timesheets Only* box checked. If the *Show My Timesheets Only* box was unchecked, the manager was able to see employee punches.

Cost Center Changes Upon Save on Piecework Tab

100410: The name of a cost center will now stay intact on the *Piecework* tab when a user selects and saves *Type In* from the *Cost Field Selectors* field in the *Bulk Hours* timesheet profile. Previously, after saving in *Bulk Hours* timesheets with *Type In* selected for the *Cost Field Selectors* field, the cost center's name under *Timesheet Edit* on the *Piecework* tab would change to the object ID, and the list values icon to view all cost centers was no longer visible.

Manager 1 Unable to Schedule Employee or See Info but Can See Timesheet

106633: When the Manager 1 or group permissions enable it, users in the Manager 1 position can view and edit their employee's schedules and account information. Before, users with the permissions of a Manager 1 were able to see the timesheets of the employees assigned to them but could not view or edit the employee schedules or account information.

Time Off Calendar Displays Blank Page

100821: In the New UI and new Mobile App, the *Time Off Calendar* now properly displays with or without a *Holiday Profile* assigned to a user. Previously, the *Time Off Calendar* was not displaying when a user did not have a *Holiday Profile* assigned to them.

Holiday Worked PC2 Rule Rounding Issues

98739: When *Total Time* under *Company Setup* was selected to *HH.00*, the *Holiday Worked* rule under Pay Calculations 2 was displaying improperly rounded time in the employee's time sheet. Going forward, users need to add *Ignore The Following Overtime Counters: Holiday Worked* within the *Holiday Worked* rule to get accurate time totals when *HH.00* is selected.

Print Timesheet Not Displaying Manual Counters Entered Daily All the Time

98523: Users can now expect to see accurate counters displayed on the printed timesheet, even if an employee does not work a shift on the day that the amount is entered. For example, when an employee works an overnight shift and then manually enter their tips on a day that they did not have a shift, those tips will display on the printed timesheet.

Time Off Validation TS Rule Not Allowing Timesheet to be Saved

93327: When the *Time Off Validation* rule under the *Time Off Request Profile* is set with an error message, users can now expect the error message only to display when invalid time off is entered by an employee, and only when the *Excess Setting* in the employee's Time Off Profile has a value other than *Ignore*. Previously, when an employee added personal hours to their timesheet and saved, then when they saved their timesheet again without any changes made, the error message displayed.

Show Exceptions to the Employee Option Unchecked Still Shows Exceptions to Employee

91297: In the *Timesheet Profile* in the *Extra Settings* widget, under *Time Allocation*, when *Show Exceptions* is enabled (for the manager), and then under *Exceptions*, *Show Exceptions To The Employee* is not enabled, the employee will not be able to see exceptions displayed on the timesheet, and only the manager will be able to see the exceptions. Previously, when *Show Exceptions To the Employee* was not enabled, the employee was still able to see exceptions on the timesheet.

Points Accrue Even if Profile is Inactive

85735: Points will no longer continue accruing on an inactive Points Profile, and if a user tries to calculate points for the inactive profile, an error message will display, *Points Profile Is Not Active*. Previously, when the *Active* checkbox was unchecked on an employee's Points Profile, points would continue to accrue.

Week Counter Totals Will Not Populate in Timesheet Print Preview

82150: *Extra Pay & Counter Adjustment* weekly counter totals will now populate in the timesheet print preview. Before, the *Extra Pay & Counter Adjustment* counter weekly totals were not displaying in the timesheet print preview.

Total Column Changes from Calc Total to RAW Total in Shift Premium Summary Tab

76057: The Calc Total will only display in the *Shift Premium Summary* tab if the *Show Raw Total Hours* setting is unchecked in the employee's Timesheet Profile and Calc Totals are available for all time entries. Raw Total hours will be displayed in the *Shift Premium Summary* if the *Show Raw Total Hours* option is checked in the Timesheet profile.

Time Off Types Not in Alphabetical Order

100216: In the New UI, under *Time Off Request*, the *Time Off Type* and *Request Type* were not displayed in alphabetical order. Going forward, the *Time Off Type* the options for both drop-downs will be in alphabetical order.

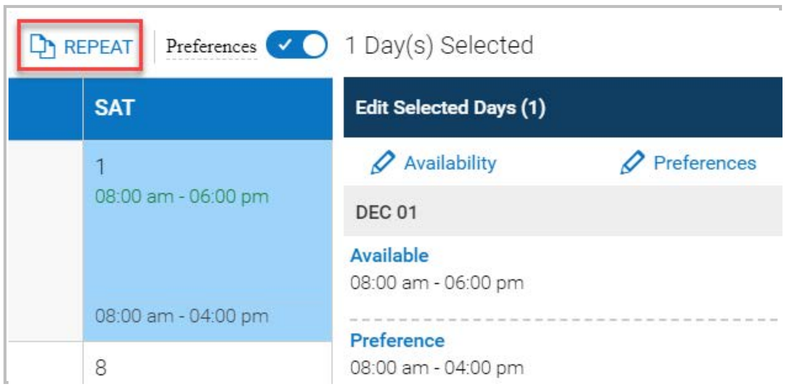
Timesheet Auto Population on "Pay Period End" Not Functioning

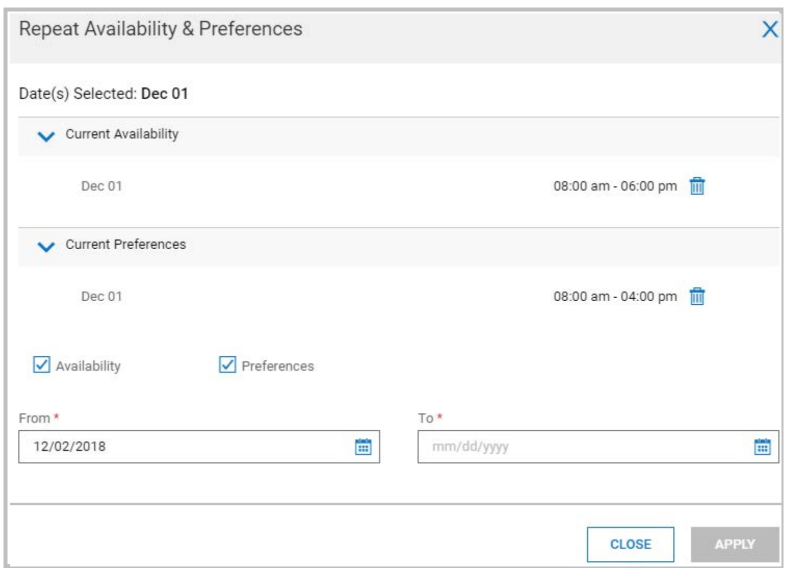
97646: When *Timesheet Auto Population* is set up to populate on *Pay Period End*, the timesheet will populate on the chosen pay period end date. Previously, the timesheet would populate as soon as the timesheet was opened.

Scheduler

Availability and Preferences: Repeat Feature

89460: A new option, *Repeat*, is now available for Availability and Preferences, and allows users to set and repeat complex, rotating patterns. For example, if an employee's availability/preference is six days at work and 3 days off, this nine day schedule can now be copied over a specified timeframe using the *Repeat* option.





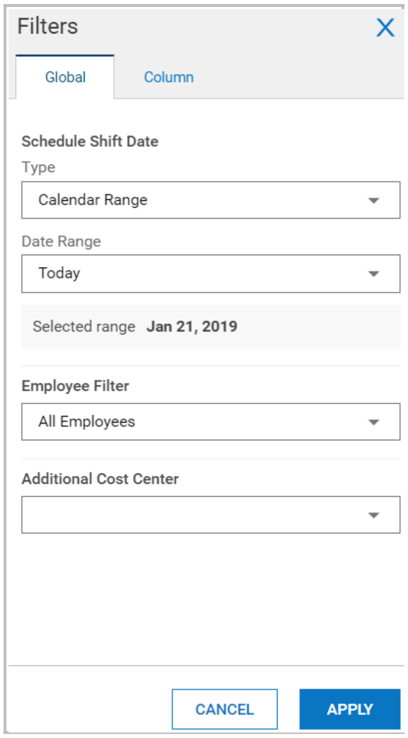
The *Date From* must be greater than the furthest date among those selected. The time frame specified should not exceed two years.

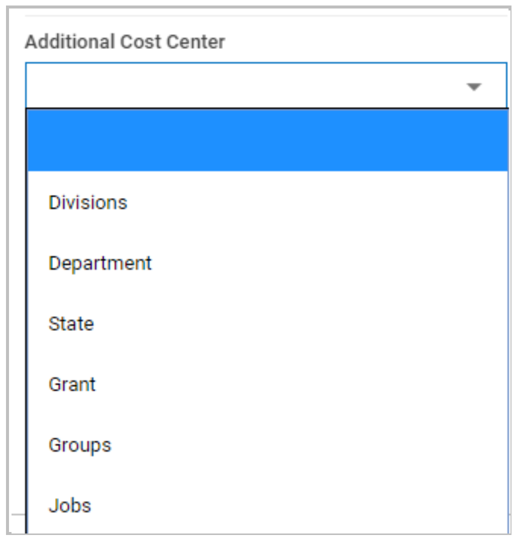
Reports

Additional Cost Centers in Roll Call Report

86570: Users can now configure the Roll Call report to consider a 2nd cost center for more accurate matching. The report can then match the employee who meets both criteria, in order (if there are multiple) of clock in times, again to improve the accuracy of the report.

The Additional Cost Center should only be a 2nd level match after there already is a match to the Scheduled Cost Center. If the employee is not matched to a Scheduled Cost Center first, then the Additional Cost Center is not considered, and the employee does not get matched to the shift at all.



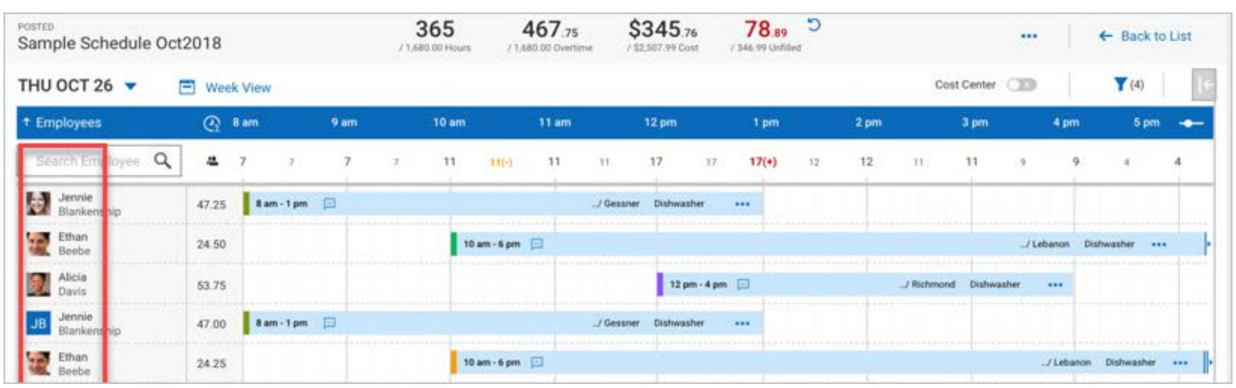


Scheduler Day View (New UI Desktop Experience)

The Scheduler Day View was introduced in the December 2018 release and is available to New UI users.

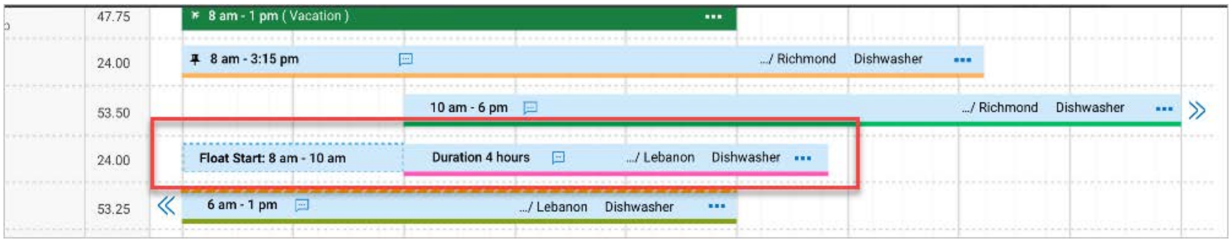
Employee Pictures

95750: Employee pictures are displayed in the scheduler day view.



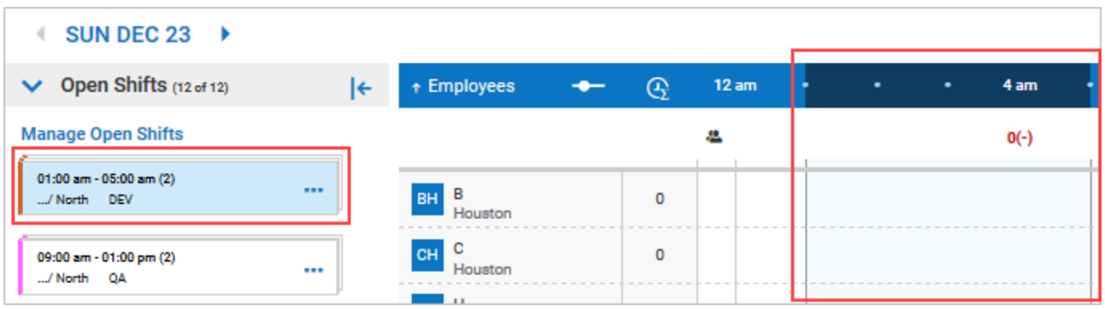
Floating Shifts Now Displayed

95733: Floating shifts are displayed in the schedule chart within the Scheduler Day View. These shifts can be added from the Schedule Action drop-down menu or edited by clicking the triple dot icon in the shift.

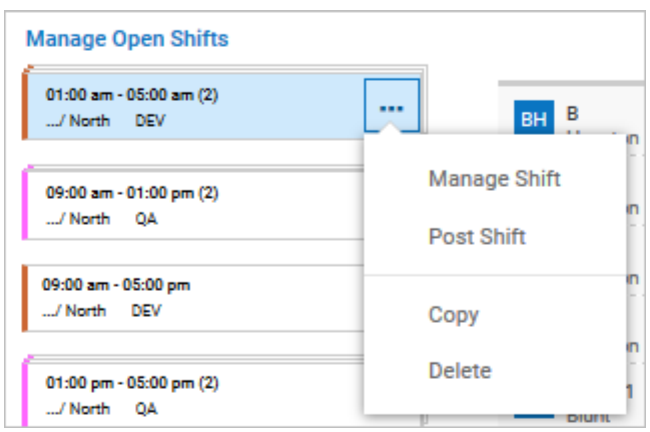


Open Shift Timeframe Highlights

92754: When hovering over an open shift in the day view of a schedule, the timeframe is highlighted. To retain the highlight of the open shift, users can click on the open shift. Clicking a second time removes the highlights.

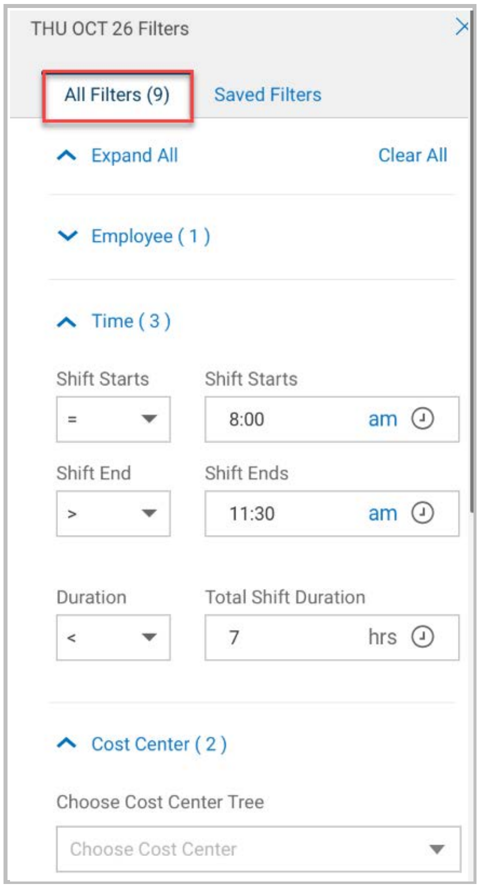


Additional functions related to open shifts are available by clicking on the triple-dot menu.



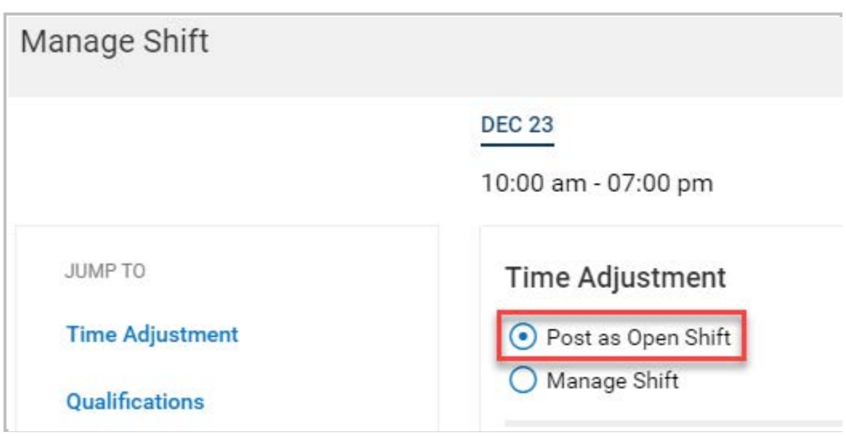
Schedule Details Filter Panel

91155: A new panel on the right side of the screen in the Schedule Day View allows users to filter the schedule based on various criteria.



Post as Open Shift Option in Manage Shift

96116: The Manage Shift feature now includes an option to *Post as Open Shift*, allowing users to easily post a shift after removing an employee from the shift.

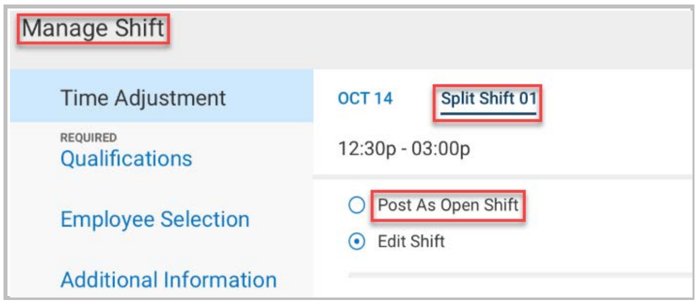


Split Shift Options

92917: *Post As Open* and *Manage Shift* actions are now available options for a Split Shift within schedules that are Posted and set to Manage Open Shifts.

If *Post As Open* is selected, when a user clicks Save, the Manage Open Shifts window will pop up with the split shift(s) selected for the manager to go through the normal posting open shifts process.

If *Manage Shift* is selected, a user will go through the normal manage shift process. If an employee is selected in the Employee Selection step, then the Split Shift will be assigned to the employee. If no employee is selected, then the Split Shift will become an Open Shift.



Frozen Shift

95748: Users now have the option to *Freeze Assigned Shifts* within the Scheduler Day View. Users can freeze all assigned shifts from the Schedule actions or freeze an individual shift. Additionally, an icon has been added to indicate that a shift is frozen.

Shifts that are frozen are ignored by the Scheduler engine auto assign function and remain in place on the schedule. Open shifts cannot be frozen.

Display Time Off Automatically in Schedule

42870: Within the Scheduler Day View, time off now displays automatically in the schedule chart. As new time off requests are approved on existing schedules, the schedules are updated.

When the TLM module is also enabled, time off entries on the timesheet will be included as well. Any time off entries on the timesheet are represented as shifts in the schedule.

Note: Time off entries cannot be edited or deleted from the schedule chart.

Schedule Cost in Schedule Metrics Dashboard

94177: The Schedule Metrics Dashboard in the Scheduler Day View now displays Schedule Cost in addition to Total Hours, Budgeted Hours and Schedule Hours.

Shifts: Credentials and Certifications

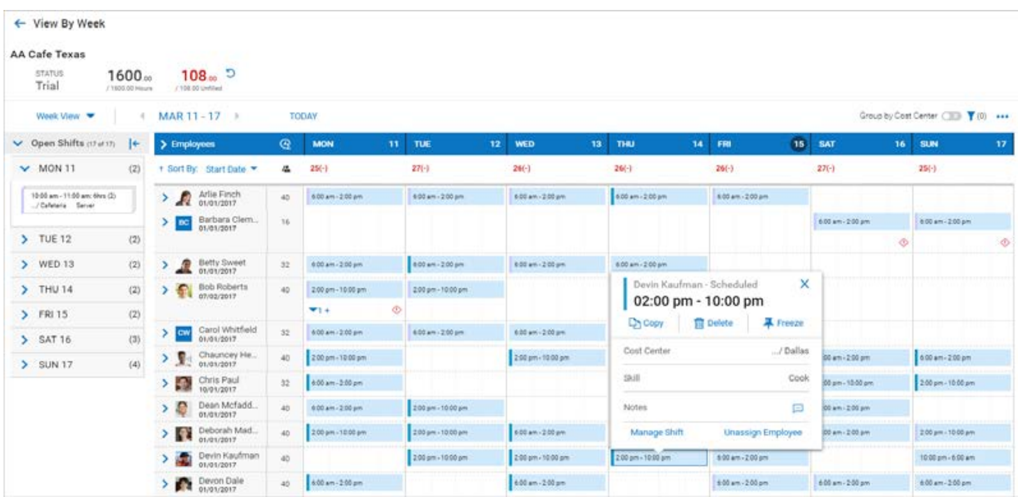
44079: For companies using both HR and Scheduler, if no Credentials or Certifications have been configured as *Is Schedulable*, then no Credential or Certification fields are available when building shifts. For companies that do **not** have HR enabled, no Credential or Certification fields are available when building shifts. This is applicable in the following areas:

- Workload Templates
- Manual Shift creation (Schedule Settings)
- Edit Shift window
- Add New Shift window

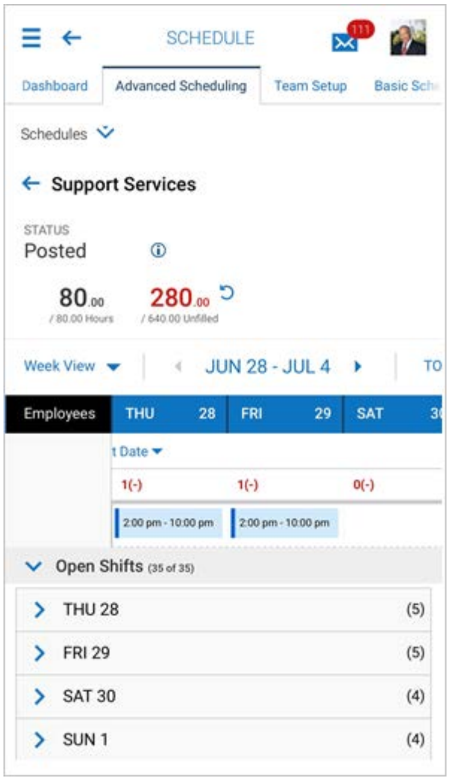
NOTE: This enhancement is applicable in both the Classic UI and New UI environments

New! Week View Added (New UI Desktop and New Mobile App)

In the previous release, we introduced the Scheduler Day View. In this release, we are introducing the Scheduler Week view. The Week View provides the same features as the Day view but gives the user more insight into the schedule for the entire week in the Schedule Chart.

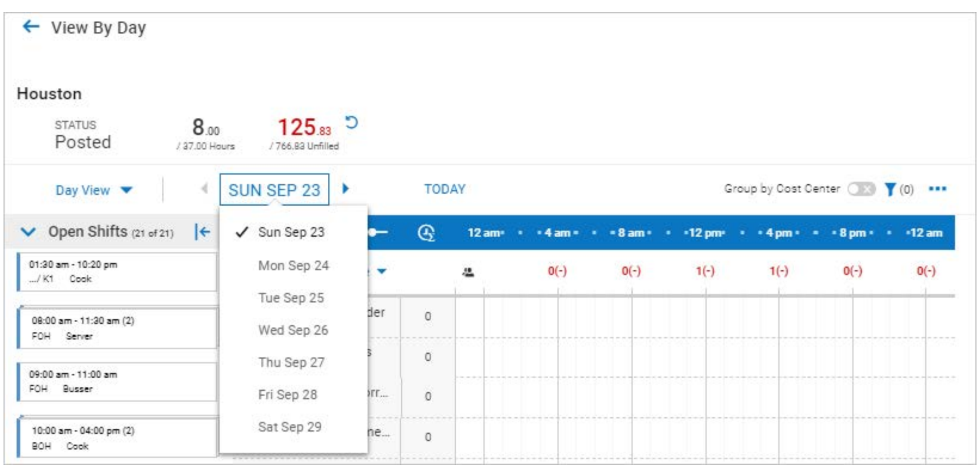


Both the Day and Week Views are also available in the New Mobile App. There are some differences due to the limited screen size. For example, Open Shifts are displayed below the shift chart and in the Week view, the days of the week are displayed in blue bar at the top of shift chart and can be swiped to the left or right to show all days of the week.



Day and Week View Headers and Shift Charts (New UI Desktop and New Mobile App)

100447: The Scheduler Day View header and shift chart have been enhanced. The schedule name is displayed above the status, and the metrics dashboard has moved to the left and is now aligned with the status. You can toggle between the Day View and the new Week View from a drop-down. While you can still navigate to the previous or next page using arrows, you can also click on the date to select a different date to view.

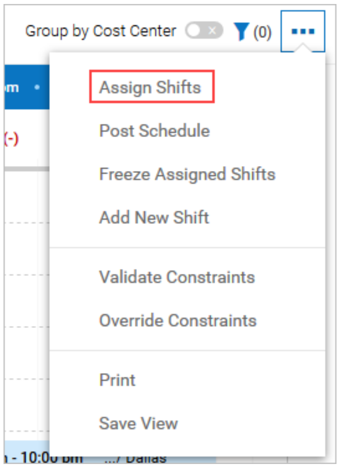


Shift Assignments

Mass Auto Assignments (Day View and Week View)

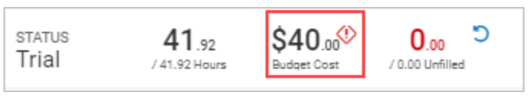
95751: In both the Day View and Week View, shifts can be auto-assigned by running the Scheduler engine. Click on the *Assign Shifts* menu option under the triple-dot icon in the view to assign the shifts. Frozen shifts are excluded from auto-assignment.

NOTE: Shifts will be assigned for the entire week from both the Day View and the Week View.



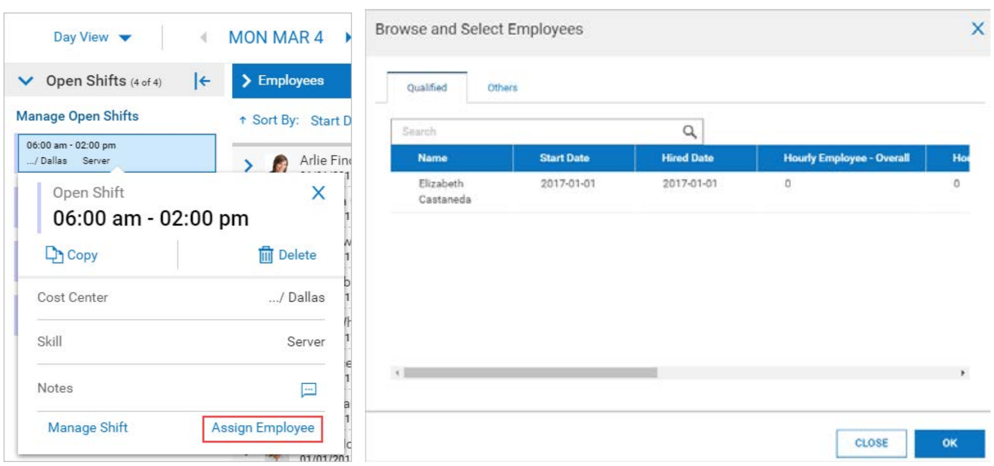
Schedule Budget Constraint Violations (Day View and Week View)

96219: In the Day and Week views of schedules, budget constraint violations are listed in the metrics dashboard at the top of the page. In previous releases, budget violations appeared in each shift in the Day View.



Assign Employee Directly From Open Shift (Day View and Week View)

98548: From Open Shifts, an *Assign Employee* link now takes users directly to a pop-up containing a list of qualified and non-qualified employees.

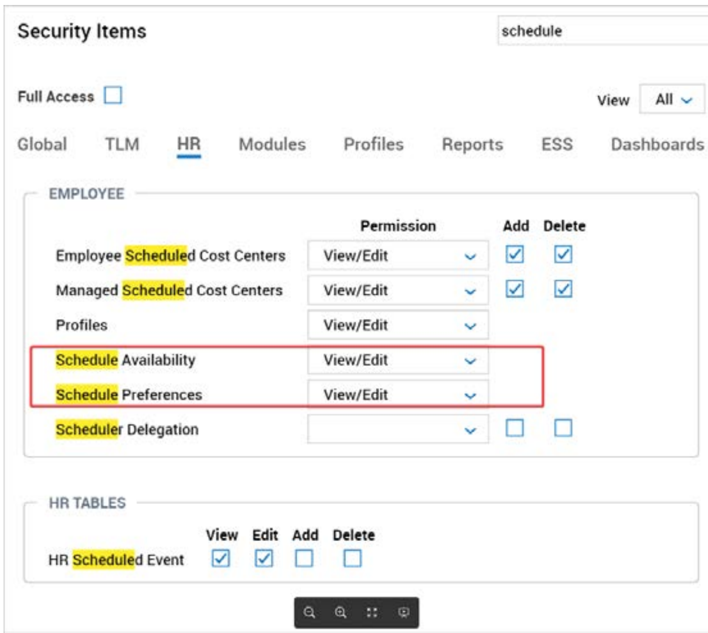


Availability and Preferences

Deleting Patterns of Availability and Preferences (New UI and Classic UI)

104227: Patterns of availability or preferences can easily be deleted from a pop-up window. Previously, when a recurring pattern of availability or preferences was defined, the exact pattern needed to be deleted from the original entries.

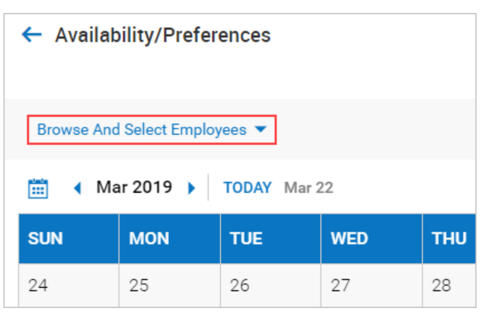
Users must have the ability to edit Schedule Availability and/or Schedule Preferences in their security profiles.

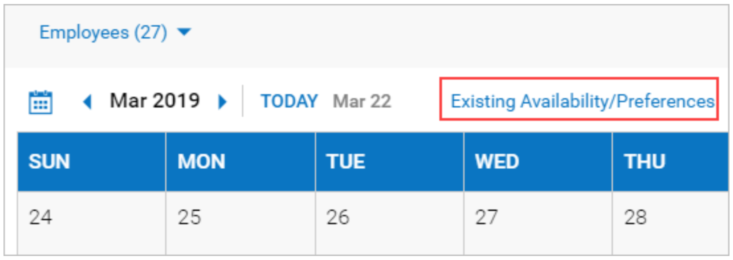


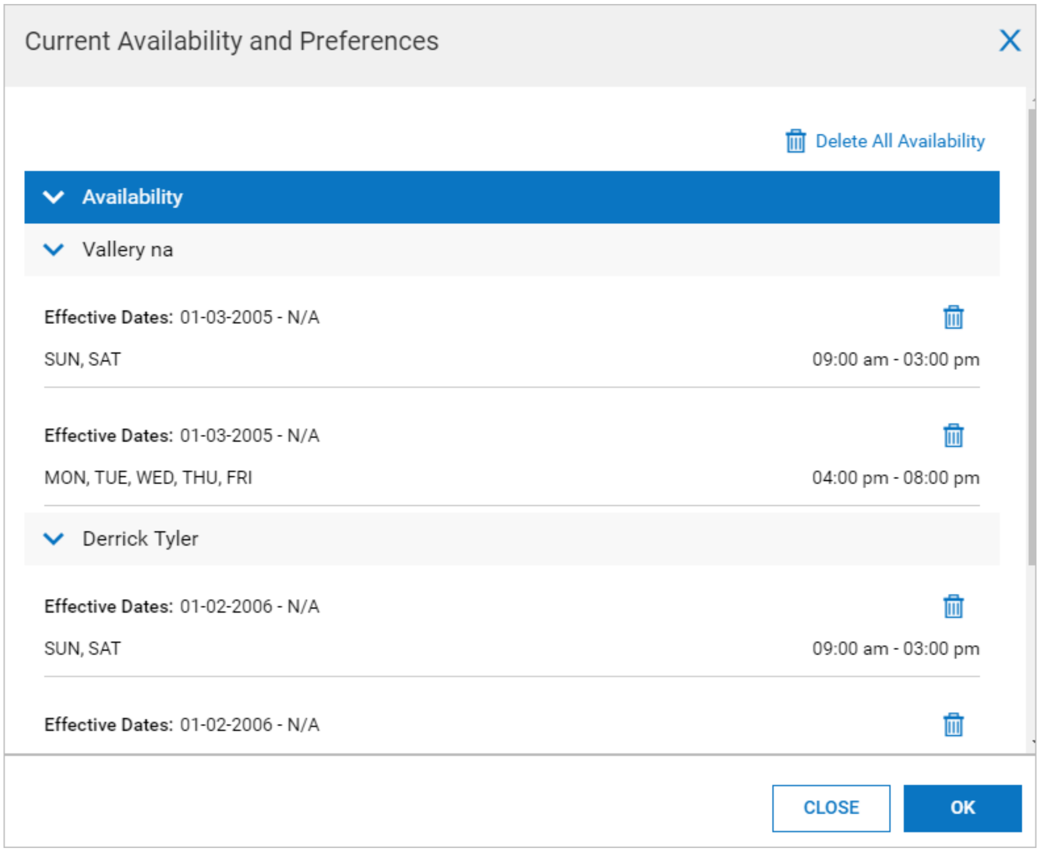
New UI

For New UI managers, employee availability and preferences are found under *TEAM > Schedule > Team Setup > Availability/Preferences*. Managers must first select a set of employees to be edited, using the *Browse and Select Employees* link. Once employees are selected, the *Existing Availability/Preferences* link appears. After clicking that link, the *Current Availability and Preferences* pop-up is displayed. For each employee, patterns of availability or preferences are displayed, days of the week, start and stop times and effective dates.

Clicking on the *Delete* icons will delete the entire pattern.



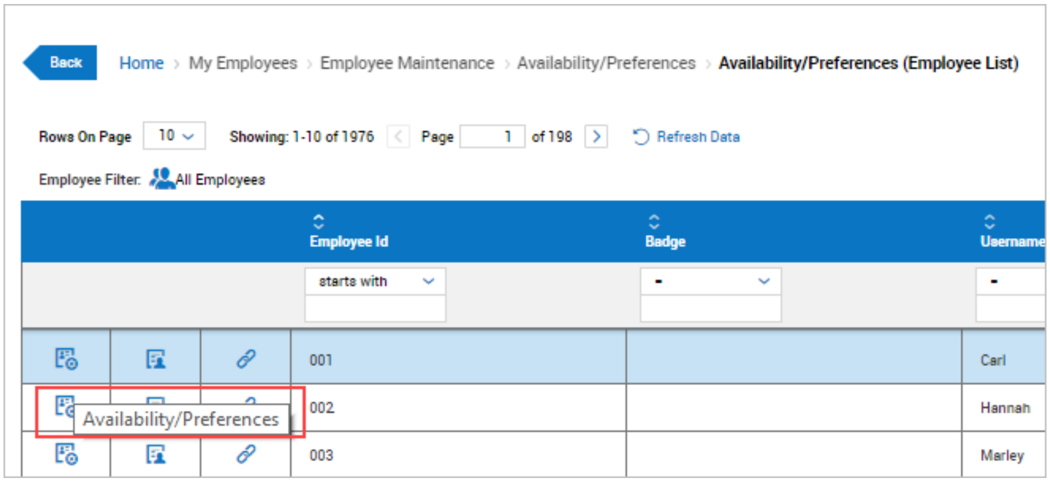




Employees with appropriate permission have access to their own settings from *My Schedule > Availability/Preferences* in the New UI.

Classic UI

In the Classic UI, availability and preferences are found under *My Employees > Employee Maintenance > Availability/Preferences.* The employee must be selected to display the calendar.



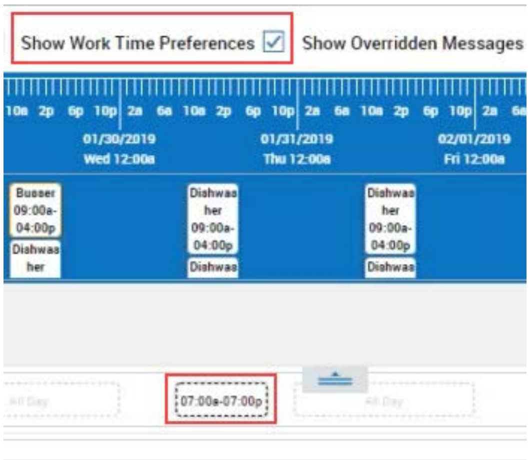
After clicking the *Availability/Preferences* icon, the calendar is displayed, with the *Existing/Availability Preference* link displayed. After clicking the link, the *Current Availability and Preferences* pop-up is displayed. For each employee, patterns of availability or preferences are displayed, days of the week, start and stop times and effective dates. Clicking on the *Delete* icons will delete the entire pattern.

Employees with appropriate permission have access to their own settings from *My Account > My Settings > Availability Preferences* in the Classic UI.

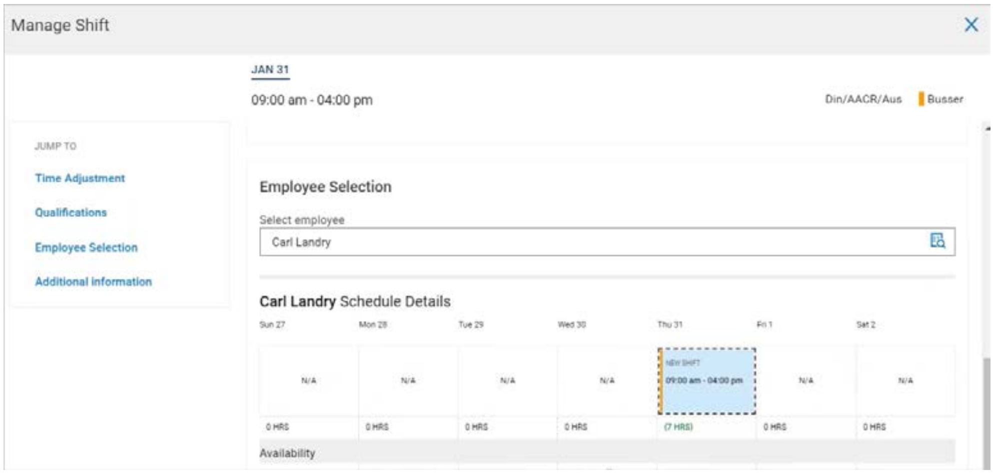
Display Calendar Dependent Availability and Preferences on the Schedule

57102: In addition to calendar independent (Workday or Dayoff) Worktime Preferences or Availability, calendar dependent (Workdate or Dateoff) Worktime Preferences or Availability are now displayed in the *Schedule By Employee* view. Previously, when an employee updated preferences or availability for specific calendar days, the updates were not shown in these views.

NOTE: The updated calendar preferences are rendered with the same dotted lines and timeframes as calendar independent preferences, but the times will reflect the employee's preferences.



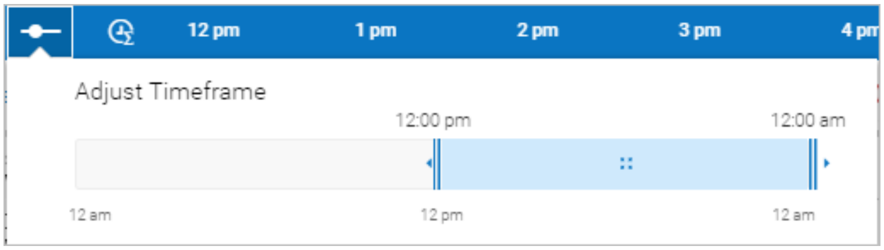
Calendar dependent availability and preferences are also displayed when editing shifts in the Scheduler Day View and the Scheduler Week view.



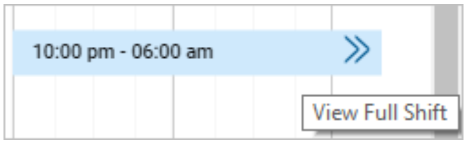
Display Shift that Crosses Midnight on Second Day (Day View)

101877: A shift that crosses the day divide is now displayed in both the starting and ending days of the shift. A shift crossing midnight is shown below.

The full details of the shift are displayed if there is enough screen space available to display the text. To focus on the shift details, use the slider bar at the top of the screen and adjust the timeframe.



The shift details appear.



On the following day, an indicator appears, showing that the shift has crossed the Day Divide.

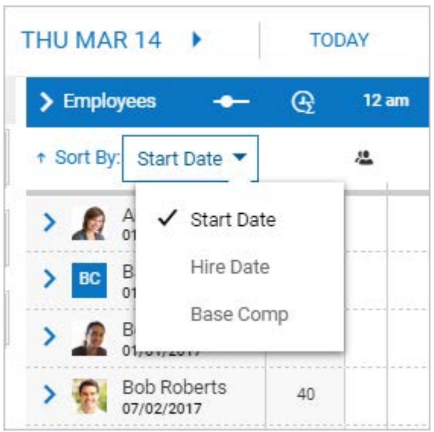
By clicking the arrows, you can navigate back and forth between the start and end days of the shift.

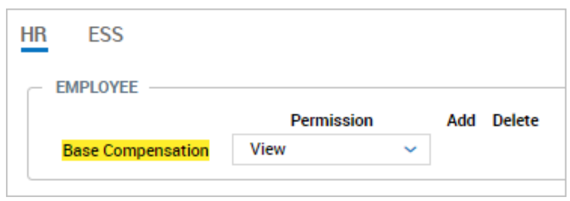
Schedule Page to Remain in Place After Saving (Day View)

97676: When a schedule has a very long list of employees, and a change is made after scrolling to the bottom of the list, the page remains focused on the change that was saved. Previously, after saving the change, the top of the page was displayed, requiring the user to scroll down again to continue with additional edits.

Schedule View Sort Options (Day View and Week View)

106377: The list of employees in the day and week views can be sorted by start date, hire date or base compensation. These additional details are displayed for each employee after clicking on the drop-down. For base compensation to be displayed, managers must have the appropriate permission to view base compensation in their security profile.





Reports

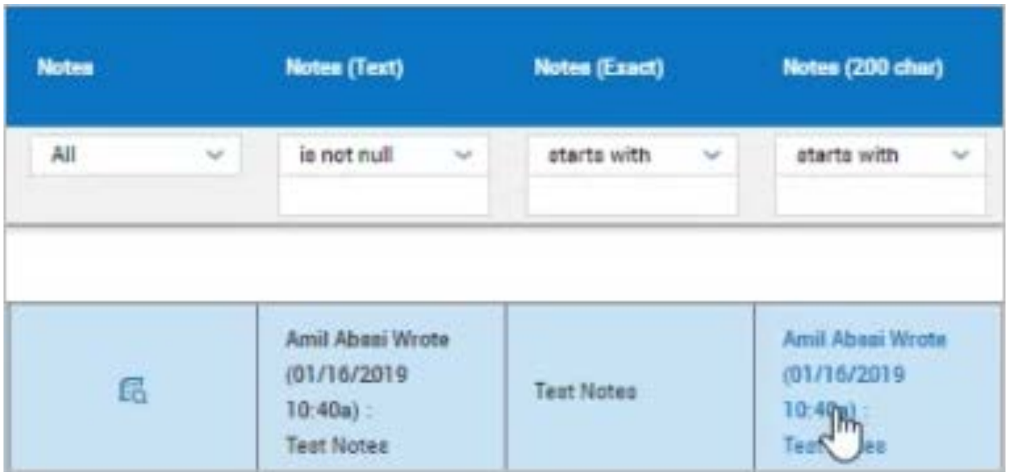
Adding Shift Notes to Scheduler Reports (Classic UI Only)

100431: For clients who need to be able print notes with schedules, notes can be added to the Open Shifts and Summary By Employee reports. The notes columns can be added using *Select Columns* in the Classic UI. The option is *not* currently available in the New UI Desktop experience. The notes can be exported and printed in the report.

The type of column selected determines how the note is displayed in the report:

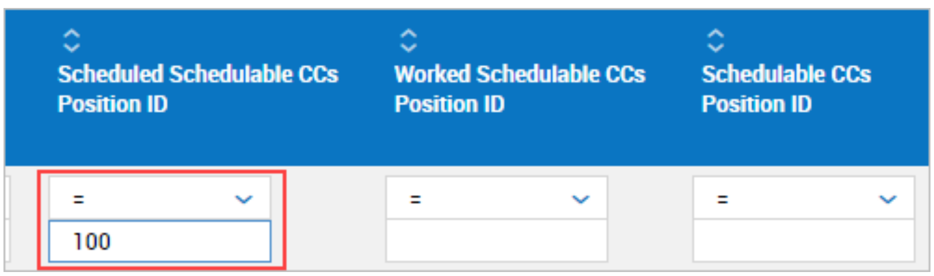
- **Notes Link** – Displays an icon that will bring up a pop-up displaying the note creator, the note text and a timestamp.
- **Notes (Text)** – Includes the name of the person who wrote the note, the time the note was created and the note text.

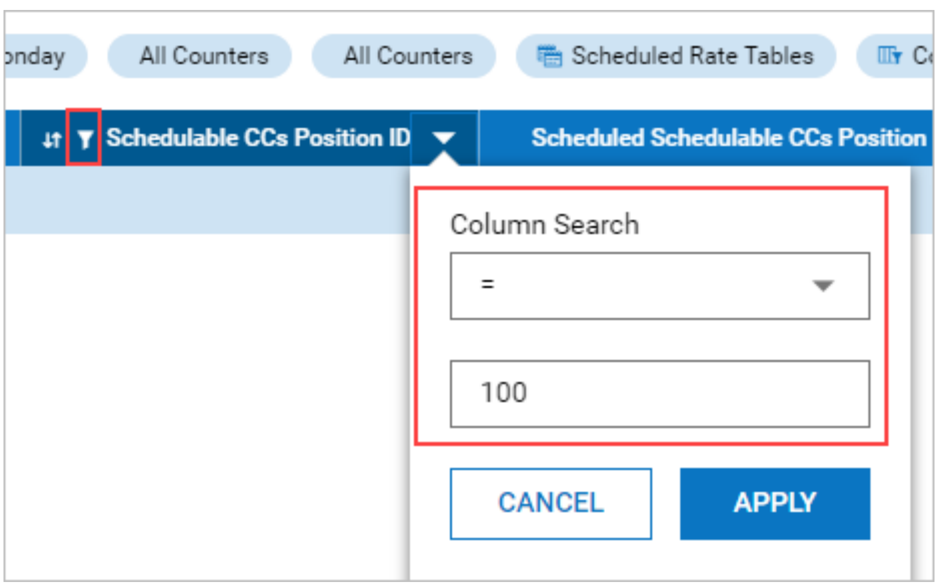
- **Notes Text (Exact)** – Display the note text only.
- **Notes Text (200 char)** –Displays a link to the pop-up containing the note text, which includes the note creator, text and timestamp.



Cost Center Custom Field Columns As Filters in Scheduled vs Actual Report (Classic and New UI)

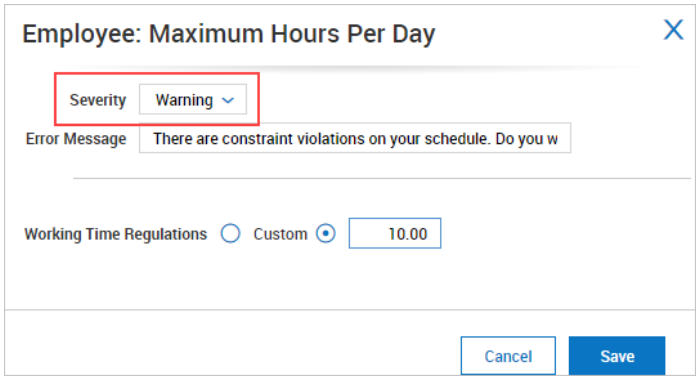
42783: Custom fields for cost centers can be optionally added to the *Scheduled vs Actual* report and used as filters in the report.

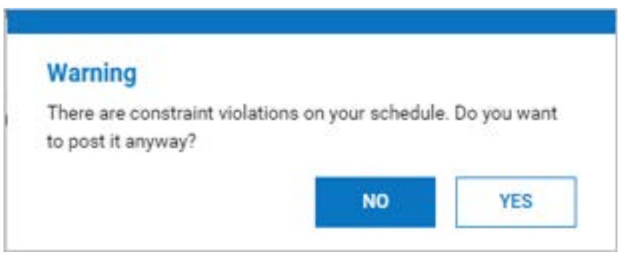




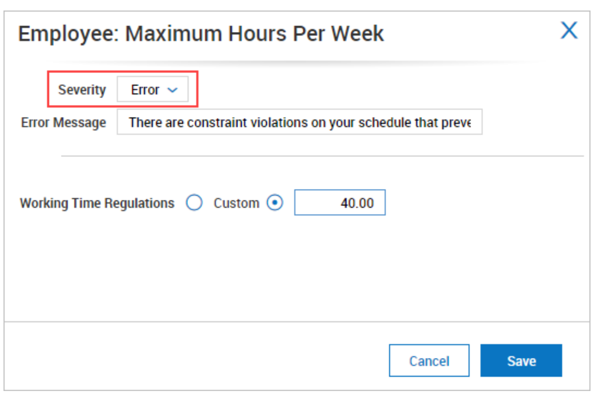
Employee and Scheduler Constraint Violation Errors and Warnings when Posting Schedules (Day View and Week View)

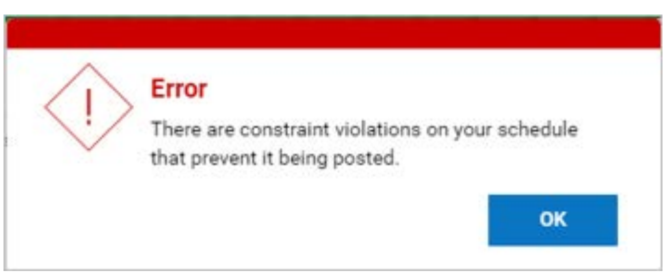
104251: Warnings and error messages are now displayed in both the Day and Week views when Schedule or Employee constraints are violated. When the constraint's severity level is set to *Warning* in the Scheduler Profile, a warning message will be displayed, but you are still able to post the schedule.





The schedule cannot be posted until constraint violations with a *Severity* setting of *Error* are resolved.





Benefits and ACA

ACA: Warning for Foreign Addresses

91912: For 2017 and older years, if a foreign address is provided in a 1095-C employee or dependent form, a validation warning appears in the AIR XML file generation that notifies users that foreign address reporting is not supported for IRS filing. This warning does not appear for 2018 as foreign addresses are now supported (see the enhancement below).

ACA: Update AIR XML to Include Foreign Addresses

91904: For 2018, if the country is the US, then the zip code from employee information will be populated in the employee's 1095-C Forms. If a foreign address is provided, then the country code for the country is populated in the employee’s country field of the 1095-C Form. For such cases, a value in the state code is not mandatory.

If the country code does not match a value in the country list, then the user must manually input the data into the 1095-C Form.

For AIR XML filling, foreign addresses are populated in foreign address tags.

ACA: Mask SSNs on Pressure Sealed Form 1095-C

97659: Users now have the option of masking the SSN’s in 1095-C forms when the forms are printed on pressure seal paper in the Deliver Forms step of the ACA Year End Process. To mask the SSNs in the forms, select Use Form Printing On Pressure Seal Paper and Mask SSNs when editing Print Settings for 1095-C forms.

ACA: Code 1G Logic in ACA Timeline

93985: Code 1G in the ACA Timeline and on the 1095-C Form is now applied when the individual was not an employee any day for that calendar year. Code 1G is not generated unless the employee is enrolled in a Cobra profile and is terminated for the entire year. If the individual was employed, code 1G is not appropriate.

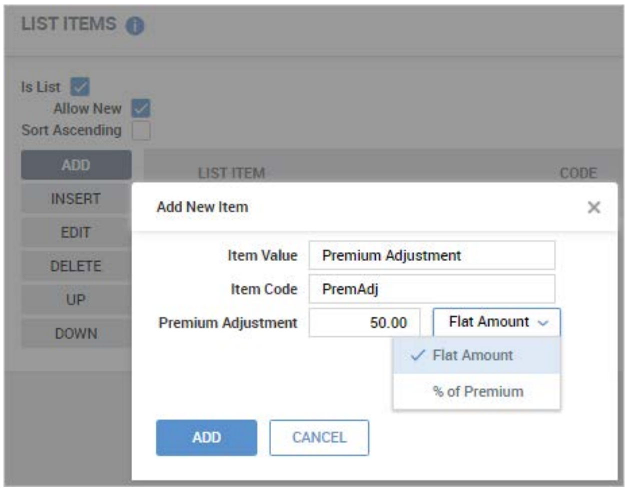
Custom Field Settings: Employer Portion of Premiums

71895: In the April 2018 system release, we implemented the ability to adjust the employee portion of benefit plan premiums based on the checkboxes/questions checked in the *Custom Field Settings* of the benefit plan. For more details, please refer to the HR release notes for April 2018 and search for 25234.

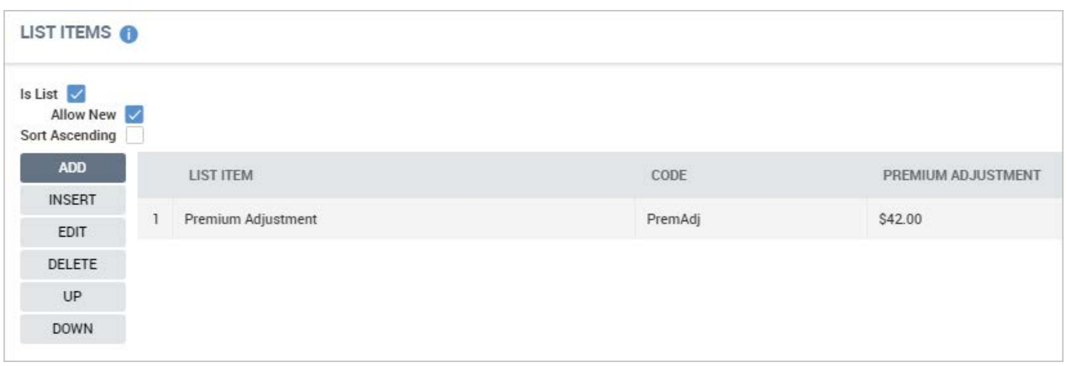
In this release, we are adding this type of support for the employer portion of benefit premiums. Edit a benefit plan under *Company Settings > Profiles/Policies > Benefits > Plans*. In the *Custom Field Settings* widget, enabling the *Affects Premium* checkbox for the setting will add a new ***ER Premium Adjustment*** checkbox. Enabling this setting will then allow the employer portion of the premium to be adjusted.

NOTE: Using this checkbox will cause an adjustment to the ER (Employer) portion that will offset the adjustment to the EE (Employee) portion of the deduction. The ER portion cannot be adjusted independently of the adjustment to the EE portion.

For the *Affects Premium* checkbox to be available, each custom field must have a list item added where the premium adjustment is set.



NOTE: When the *Flat $ Amount* is selected, the value is applied to the Monthly Premium, not the per Pay Period amount.

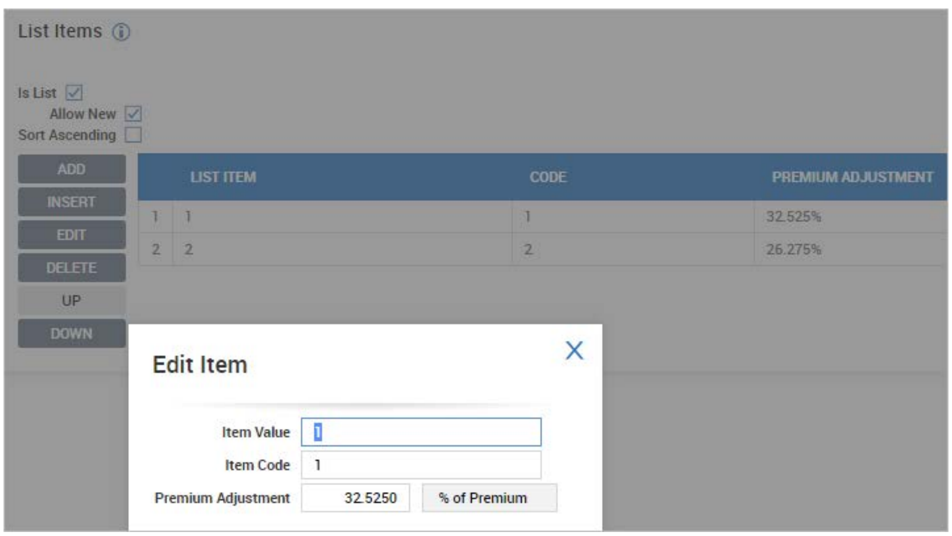


When the employee is enrolled in the Benefit Plan and selects from the list for the custom field, and the *ER Premium Adjustment* checkbox is enabled, an adjustment to the employer portion of the premium will be made based upon the *Premium Adjustment* defined for the list item.

For example, if an employee answers a question for one of the custom fields, adjustments will be made to both the employee and employer portion. The system will generate a warning message to inform the user of the adjustment.

Custom Field Settings: Affects Premium Setting to Allow Decimals

75867: When defining *Custom Field Settings* within the *List Items* widget of custom fields in Benefit Plans, the *Premium Adjustment* entries will now support decimals.

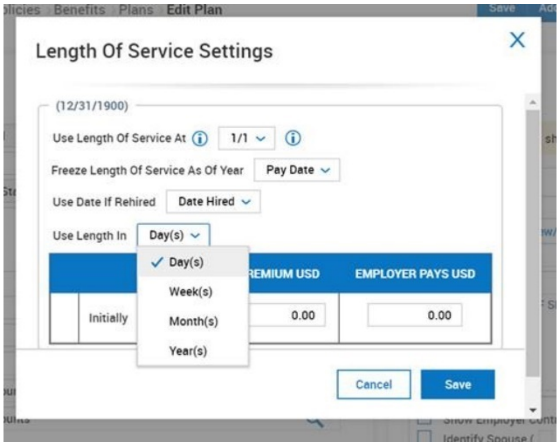


Benefit Plans: Length of Service Coverage Type Field Length Increased (Classic UI & New UI)

86466: All the options in the drop-down for the *Use Length In* setting for the *Length of Service* coverage type have been increased from 3 to 4 characters in length. This is accessed by editing the pricing for a benefit plan. This will allow the premium rate to change over a longer period as service levels are added.

This is located under benefit plans for both the Classic UI and New UI

- *Company Settings > Profiles/Policies > Benefits > Plans*



Imports: Benefit Plan Import (Classic UI & New UI)

94941: The Benefit Plans import template can now be used to overwrite and update existing employee benefit plans. We have added an ***Overwrite Existing Plan*** column and if Y is placed in this column, the data in the row will overwrite the existing plan if the coverage name and coverage start date match. If an N is placed in the column, or if it is left blank, the behavior of the template will be as it always has been.

The *Benefit Plans* import template is available under *Company Settings > Imports > Overview*, in the *HR* category.

Overwrite Existing Plan			Y or N		**Y** = allow code to automatically overwrite the data for an existing account benefit plan. **N** = no overwriting allowed, default = N. **For Y**, the import will attempt to overwrite any data entered into that line in the existing plan record for that employee and the system will use the "Deduction Effective From" date, the plan name, and the coverage level name to determine if there is an existing plan record to update on the employee's record.
EOI Override			Y or N		**Y** = Override EOI requirements. If left blank, then **N** is used as default value.
EOI Override Reason	Yes(if EOI Override set to Y)	512			

AP	AQ	AR	AS
erride	**EOI Override Reason**	**Adjust End Date**	**Overwrite Existing Plan**
			Y
			N

Reports: New Report for Benefit Questionnaire Answers (Classic UI & New UI)

💡14544: To aid managers and administrators in being able to access benefit questionnaire answers of their employees, we have pulled this information from benefits and have created a separate report. Previously, this data had to be accessed from the Change Request Summary, view each employee, and then review the questionnaire. The report will display the question label/answer, answer type, and date completed. Additional columns are available to be added.

The new reports are available as follows:

Classic UI

- *My Employees > Employee HR Maintenance > Benefits > Benefit Questionnaire Answers*

New UI (Desktop & Mobile)

- *Team > Benefits > Reports > Benefit Questionnaire Answers*

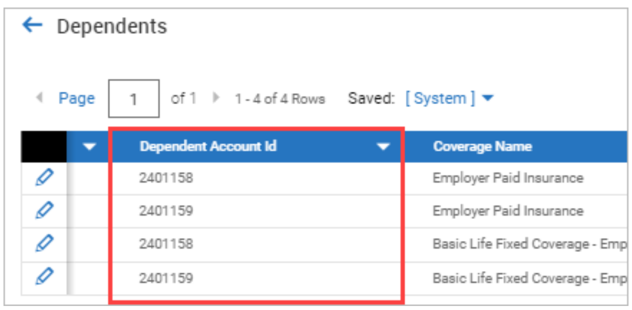
Reports: Account ID Added to Dependents Report (Classic UI & New UI)

98142: Because some integrations cannot use a dependent's social security number, the unique system account ID that is assigned to each dependent in the system will now be available as a column to be added to the Dependents report.

The ***Dependent Account ID*** column is now available to be added to the following reports:

Classic UI: *My Employees > Employee HR Maintenance > Benefits > Dependents*

New UI: *Team > Benefits > Dependents*



New UI: Benefit Enrollment – *Spouse (Domestic Partner)* Label Change

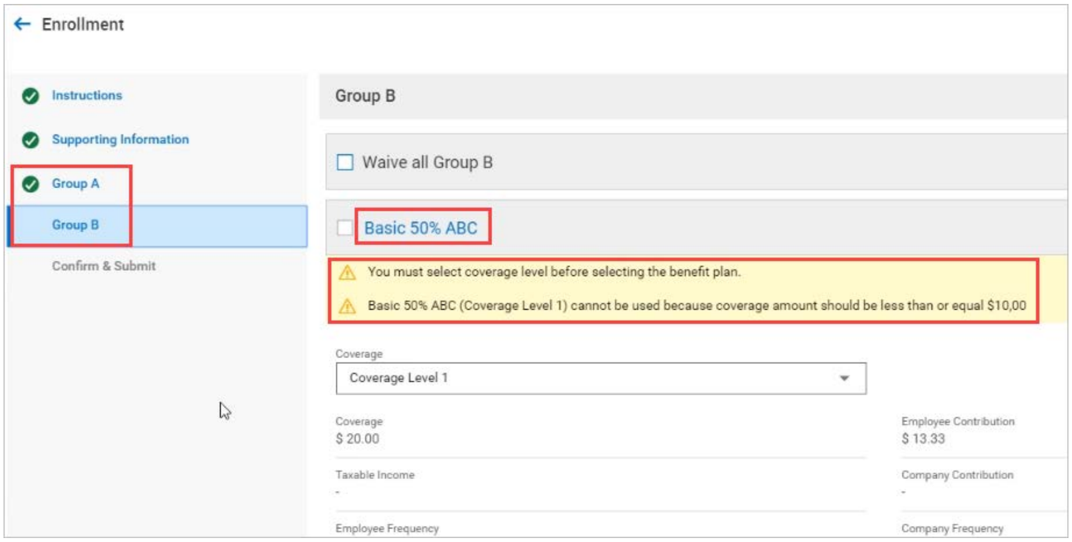
92461: In the New UI, when employees enroll in, or change benefits and include a spouse, the former ***Spouse (Domestic Partner)*** label will now show as just ***Spouse*** since not all benefit plans offered by employers may cover domestic partners.

New UI: Benefit Plan Coverage Rule Change for Enrollment (Desktop & Mobile)

96871: Previously, during benefit enrollment, when two plans were available, and employees made their selections on the first plan and moved on to the second plan, if the second plan was dependent on the selections made in the previous plan and the selection made in the second plan activated an error, the second plan could not be accessed again to fix the error without needing to deselect and re-save the first plan. This behavior required employees to start over rather than allowing them to fill out the pertinent information in the second plan.

In this release, we have created a way for employees to correct problems without having to start over. In this example, the employee has made their selections in the Group A benefit plan and has moved on to the Group B benefit plan.

A warning is displayed and if the employee continues without correcting the problem, an error message will be generated. By clicking the hyperlinked name of the coverage (Basic 50% ABC), the employee can simultaneously re-select the correct coverage amount, save and then proceed without having to go back to Group A and start over.

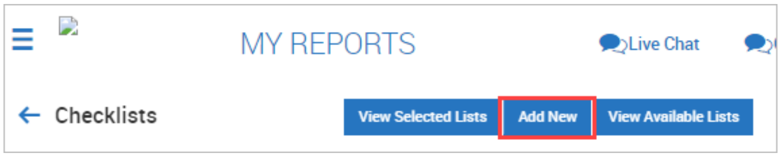


Human Resources

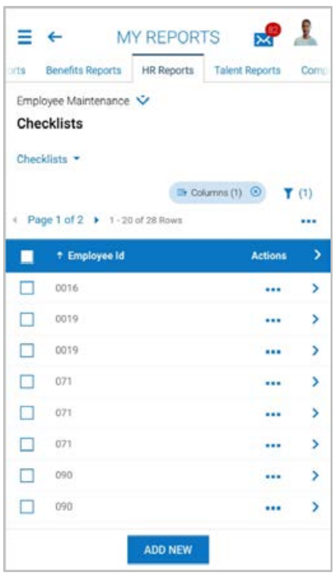
Checklists Report Page: Ability to Add New Checklists in New UI

97092: Within the New UI, users will now be able to add new checklists to the Checklists report page. This is accessed under *My Info > My Reports > HR Reports > Employee Maintenance > Checklists*.

Desktop



Mobile

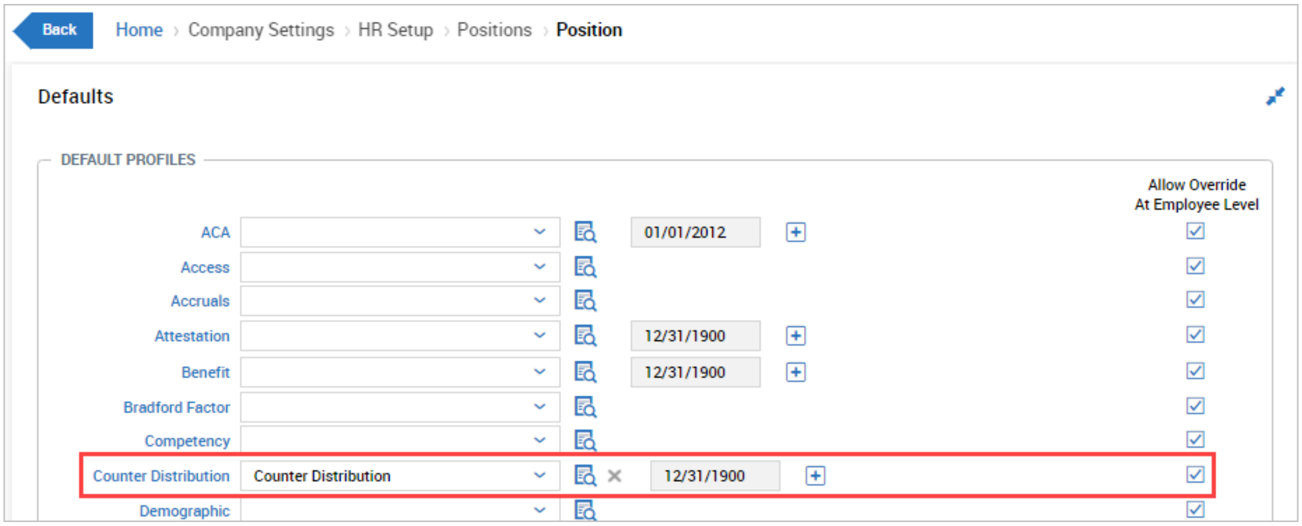


Counter Distribution

The following has been completed for Counter Distribution Profiles.

Counter Distribution Profile Added to Position Defaults

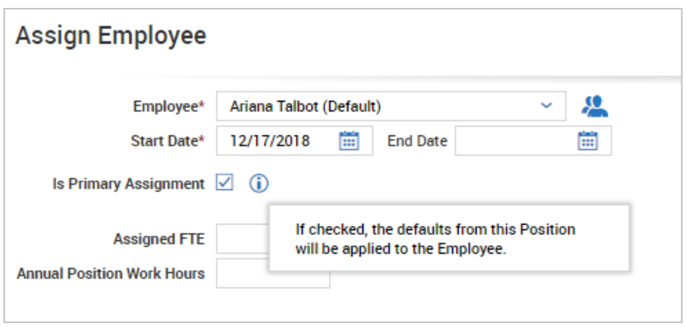
84375: For companies with both TLM and HR sub-systems enabled, and using Position Management (an HR option), we have now added the Counter Distribution profile as an option to be added to the *Default Profiles* section within a Position. Adding default profiles to positions will result in that profile being automatically assigned to employees who have been assigned to that position.



Positions are available under *Company Settings > HR Setup > Positions*.

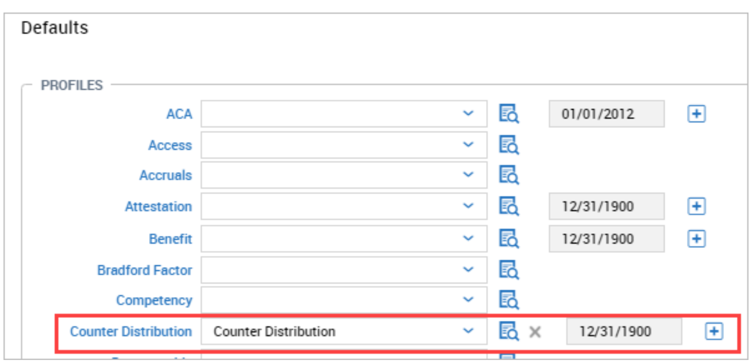
The defaults from the Counter Distribution profile, or any default profile, will be applied to employees only if the

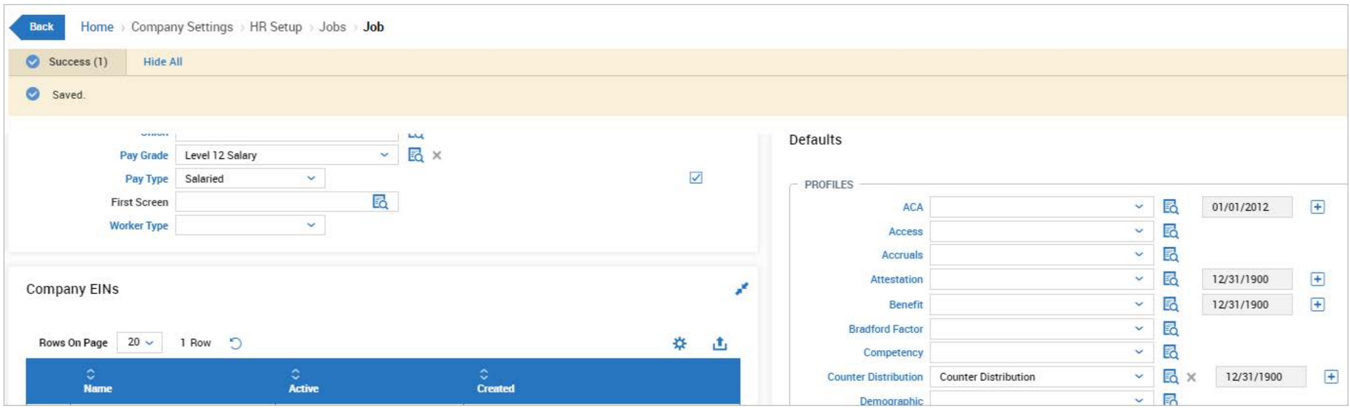
Is Primary Assignment setting is checked within the *Assign Employee* pop-up, which is available from the *Assign Employee* button within the Position.



Counter Distribution Profile Added to Jobs Defaults

84374: For companies with both TLM and HR sub-systems enabled, and using Jobs (an HR option), we have now added the Counter Distribution profile as an option to be added to the *Default Profiles* section within a Job. Adding default profiles to Jobs will result in that profile being automatically assigned to employees who have been assigned to that Job.



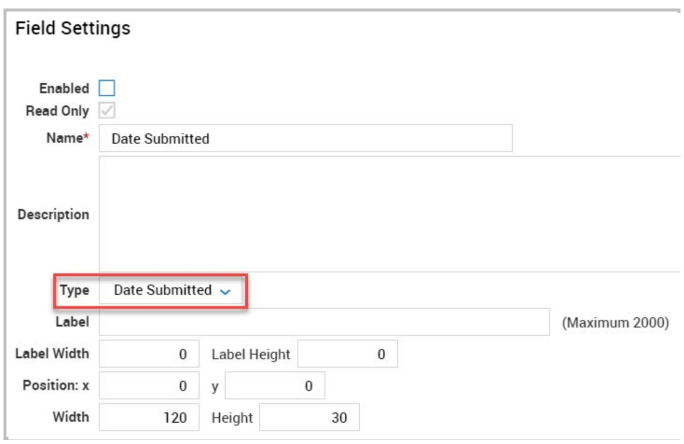


Custom Forms

The following enhancements have been added for Custom Forms.

Date Submitted Field on Custom Forms

6109: The *Date Submitted* field on Custom Forms now defaults to today's date, or the date on the local machine, when the Custom Form is added to an employee. The date can initially be updated if necessary, but once the form is saved and submitted, the date can no longer be changed.



Read Only is checked by default for the *Date Submitted* and is disabled for changes.

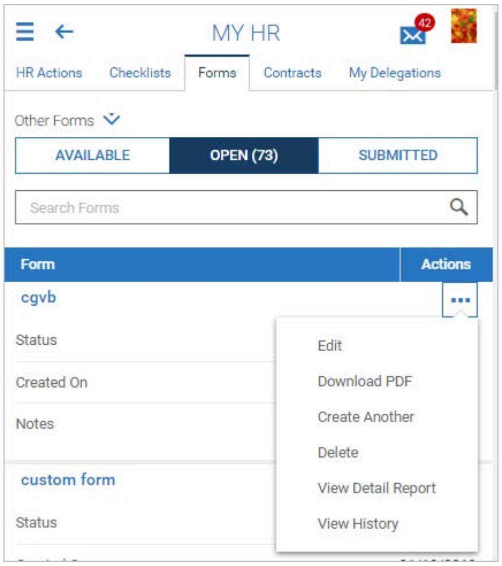
Custom Form Action Options Added for Employees and Managers in New UI

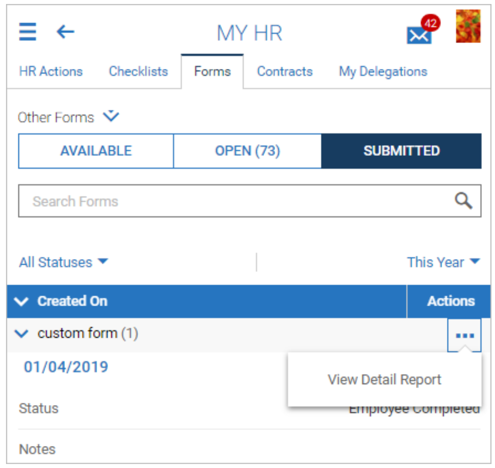
95983: Within the New UI, employees will now have increased functionality when accessing custom forms in the *Other Forms* or *All My Forms* menu, located under *My Info > My HR > Forms > Other Forms* or *All My Forms*. In the available options under the *Actions* triple dot icon, users can edit or delete a form, create another form, download a PDF of the form, view the history of the custom form (what has been submitted) and view the detail report (where custom form items can be edited or deleted.)

The *View Detail Report* option will be available on both the *Open* and *Submitted* tabs.

This will be available for both the desktop and mobile experiences.

Employees

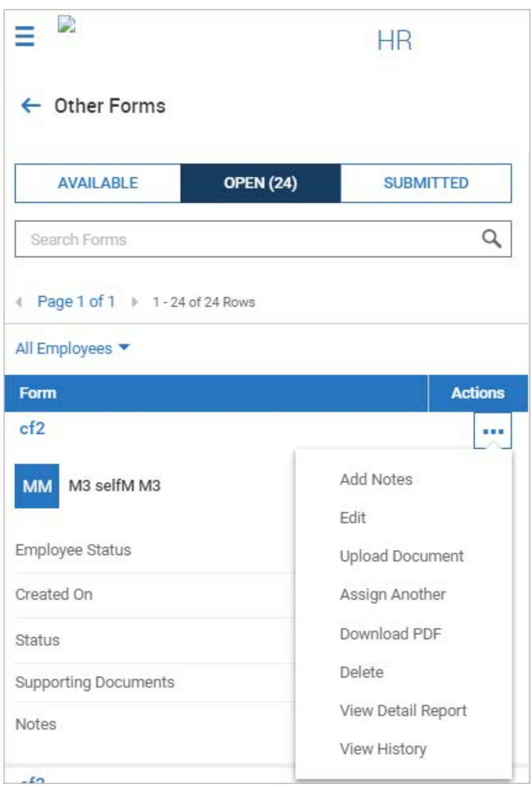


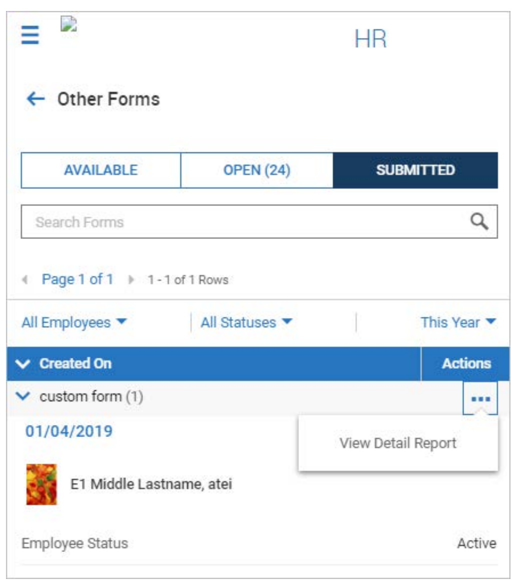


Managers will also have many of these options under *Team > HR > Forms > Other Forms* or *All Forms*. Managers can edit and delete custom forms from their employees, add notes, upload documents, or assign the form to another employee, view the history (what has been submitted), and view the detail report where custom form items can be edited or deleted.

The *View Detail Report* option will be available on both the *Open* and *Submitted* tabs.

Managers



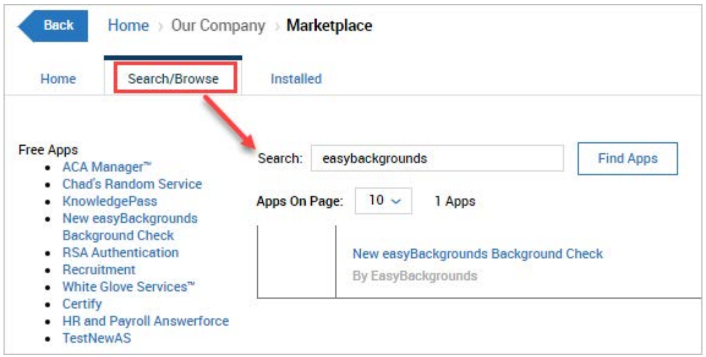


EasyBackgrounds: New Version Updates

The following enhancements have been added to the new version of the EasyBackgrounds Marketplace product.

Old Version No Longer Available for Download

97494: With the release of the new version of EasyBackgrounds, the old version will no longer be available for download from the Marketplace with this system release. This applies at the Admin and Company levels. Users who still have the old version will still be able to use it, but all new users will download only the new version.



New Version Retains Historical Data of Old Version

93760: When migrating from the old EasyBackgrounds version to the new one, the new version will store all the historical data related to background checks that were created using the old version.

This information will be available from the following areas of the product:

Admin

- *My Employees > Employee Maintenance > Background Check > Background Checks History*
- *Recruitment > Background Check > Background Checks History*

New UI – Managers

- *Team > HR > Employee Maintenance > Background Check > Background Checks History*
- *Team > Recruitment > Pre-boarding > Background Check > Background Checks History*

New UI – Employees

- *My Info > My Information > My Profile > My Background Checks*
- *My HR > Background Checks > Background Checks History*

Classic UI - Employees

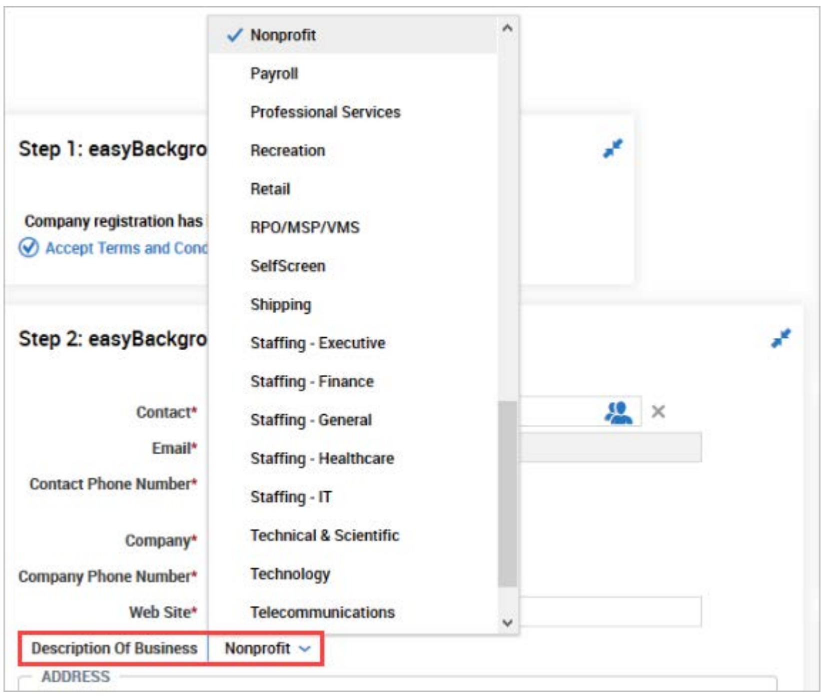
- *My Account > My Forms > Background Checks > Easy Backgrounds*
- *My Account > My Background Checks History*

User Sub-Account Option

97522 – EasyBackgrounds users can now have accounts separate from the admin account. When logging in to easyBackgrounds, users will see the default admin account, which is now editable and can be replaced with their own account. Accounts are created through the Marketplace. Once created, easyBackgrounds creates the account for users.

Step 2: Description Of Business Field Updated in Configuration Page

95098: After adding the *New easyBackgrounds Background Check Marketplace* product, the product must then be configured with your company's information. In the *Step 2:Easybackground Configuration* widget, the ***Description Of Business*** field formerly contained a text field. In this release, we have replaced the text field with a drop-down of pre-defined business values from which you can now choose.



EasyBackgrounds Configuration Instructions Widget

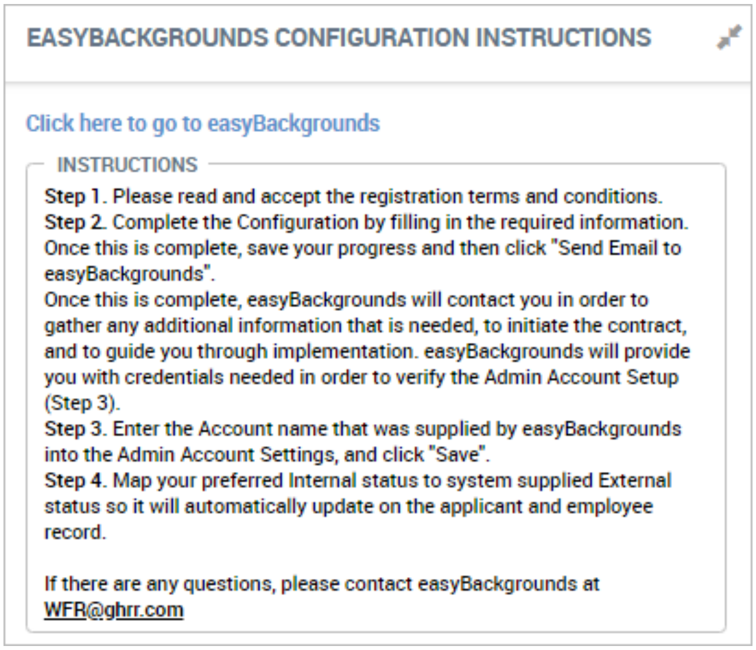
The following enhancements have been added to the EasyBackgrounds configuration page. The configuration page is accessed under *Our Company > Marketplace* and then from the *Installed* tab, click the *Edit* icon for the *New easyBackgrounds Background Check* product.

Hyperlink Added to Widget

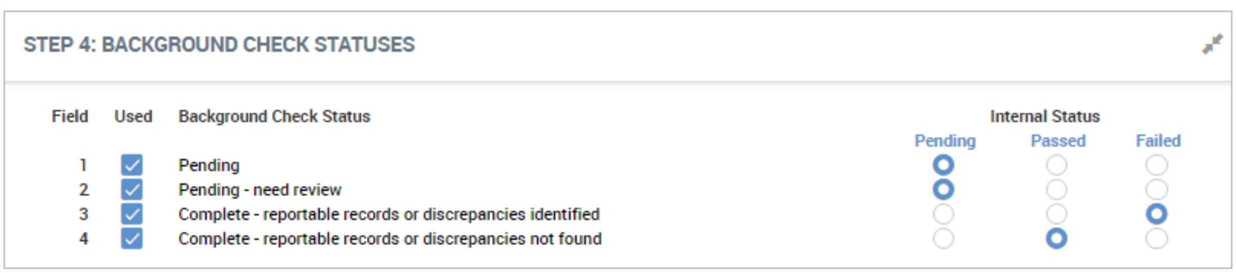
98626: A hyperlink has been added to the *EasyBackgrounds Configuration Instructions* widget, and when clicked, will take the user to https://www.easybackgrounds.com/.

Step 4: Added to Widget

93304: Within the New easyBackgrounds Background Check configuration page, we have added a new ***Step 4*** within the *Instructions* widget. This step allows you to map your preferred internal status to system supplied external statuses. This is done within the new ***Step 4: Background Check Statuses*** widget.



The Step 4 widget allows you to set which statuses will be used. Each status can then have an *Internal Status* set. Options include *Pending*, *Passed*, and *Failed*. These statuses, once set and saved, will automatically update applicant and employee records when a background check has been initiated.



Once internal statuses are set, you can monitor these statuses from the ***Background Checks*** report. The mapped statuses will display in the ***Internal Status*** column. Each background check row can be refreshed and the status in the column will be updated. Other columns affecting Internal Status are available in the report to show if a status has been modified. These columns will update if a user has manually changed a status.

BACKGROUND CHECK STATUS RECEIVED ON	INTERNAL STATUS	INTERNAL STATUS MODIFIED BY	INTERNAL STATUS MODIFIED ON
=	=	=	=
12/04/2018 03:31p	Pending		
12/04/2018 03:33p	Pending		
11/12/2018 12:26p	Pending		
11/08/2018 03:01p	Failed	e2 e2	11/06/2018 11:59a
11/08/2018 03:05p	Pending		
11/08/2018 03:01p	Pending		

Background Checks Report

95091: On the *Background Checks* report page, we have updated the statuses in the ***Background Check Status*** column. They will now show as either ***Complete***, ***Pending***, or ***Unfilled***.

Previously, the statuses showed as *Deleted*, *Pending Need Review*, and *Unfilled*. The new statuses more accurately represent the new background check product.

The report can be accessed from the following locations.

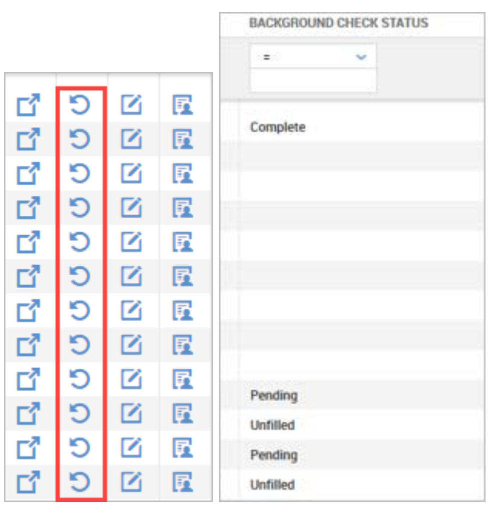
Classic UI – There are two menu paths you can take to get to this report page and initiate a background check.

- *My Employees > Employee Maintenance > Background Checks*
- *Recruitment > Background Checks*

New UI – There are two menu paths you can take to get to this report page and initiate a background check.

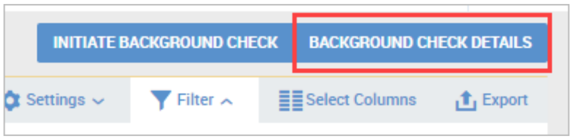
- *Team > HR > Employee Maintenance > Background Checks*
- *Team > Recruitment > Pre-boarding > Background Checks*

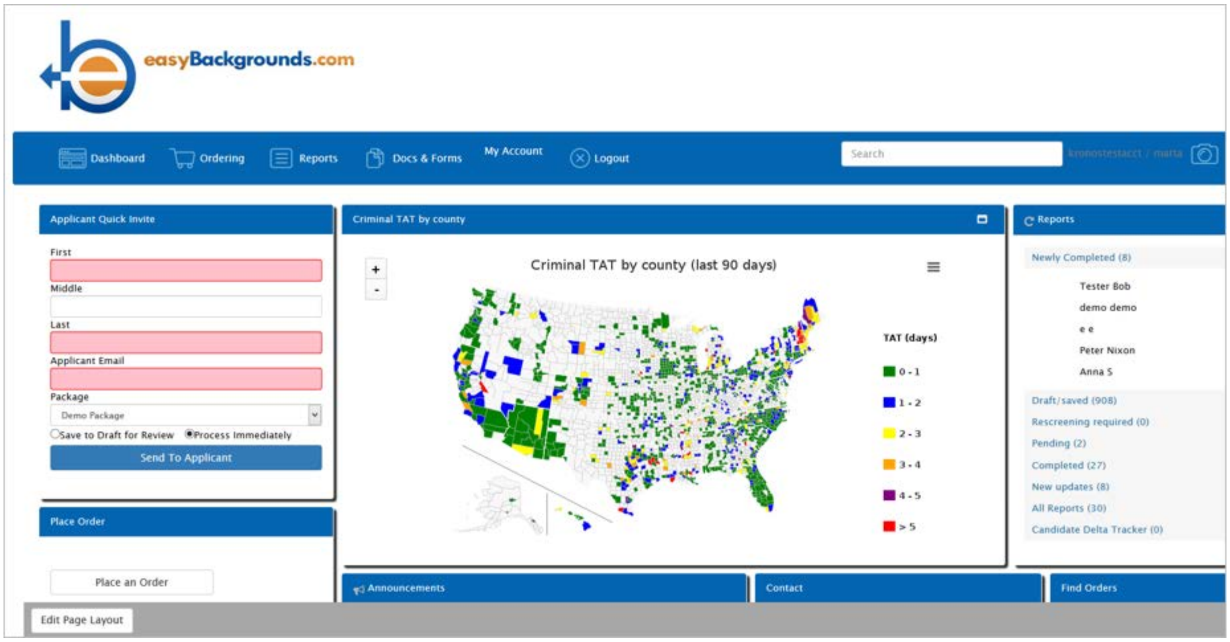
To refresh the status column, click the *Request Background Check Status* refresh icon for any background check row on the page.



Background Check Details in Background Checks Report

87930 & 90338: Within the *Background Checks* report, a new ***Background Check Details*** button is available, and when selected, will take you to the easyBackgrounds dashboard.





The use of this button requires the user to register their easyBackgrounds credentials. Users can register their credentials by navigating to:

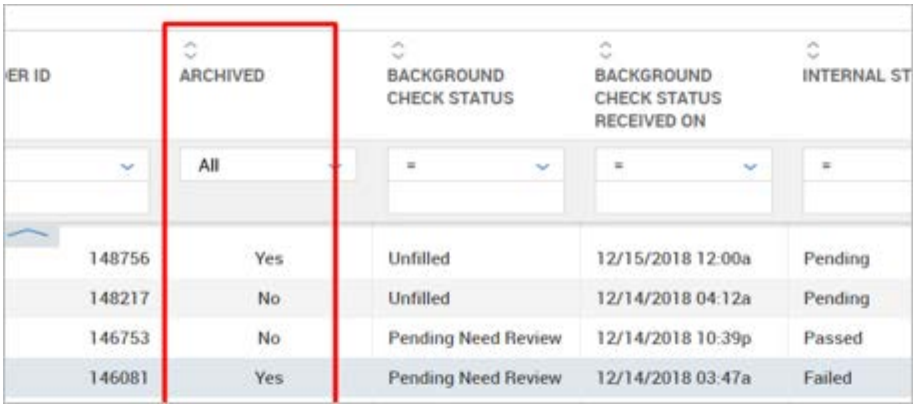
Classic UI: *My Account > My Settings > easyBackgrounds Credentials*

New UI: *My Info > My Information > My Profile > easyBackgrounds Credentials*

Archived Column Added to Background Checks Report

93324: Within the *Background Checks* report, you can now view if there are archived attributes from easyBackgrounds. A new ***Archived*** column is available to be added to the report. This column contains a drop-down which has the options of Yes, No, and All. Clicking the *Request Background Check Status* refresh icon in the report will update the column status for that entry. Note that when clicking this icon, all status columns will be updated.

- **Yes** – Will show all requests with archived attributes
- **No** – Will show all requests not containing archived attributes
- **All** – Will show both Yes and No results



ER ID	ARCHIVED	BACKGROUND CHECK STATUS	BACKGROUND CHECK STATUS RECEIVED ON	INTERNAL ST
	All	=	=	=
148756	Yes	Unfilled	12/15/2018 12:00a	Pending
148217	No	Unfilled	12/14/2018 04:12a	Pending
146753	No	Pending Need Review	12/14/2018 10:39p	Passed
146081	Yes	Pending Need Review	12/14/2018 03:47a	Failed

Employee Information – New UI

The following functionality has been added in the Employee Maintenance menu of the New UI. This functionality is located under *Team > My Team > Employee Information*.

Manual Hire: Basic Hire Functionality Added in New UI

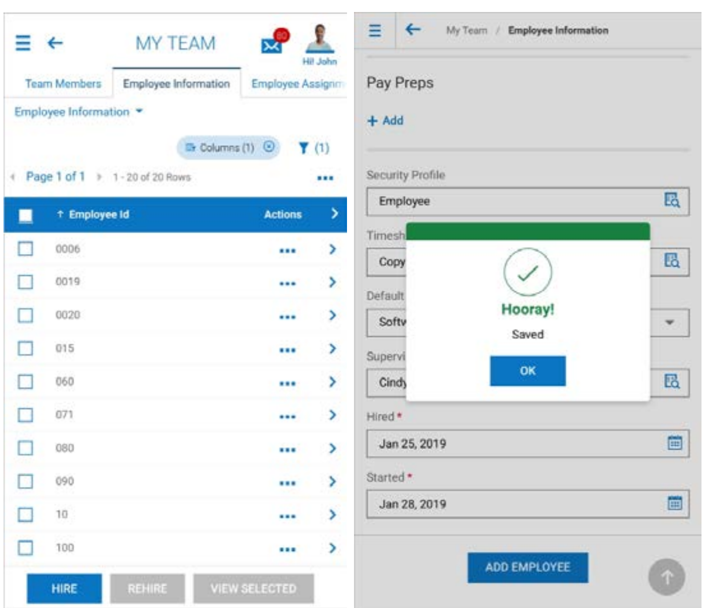
97890: Within the mobile version of the New UI, users with the proper permissions will now be able to manually hire new employees within the *Employee Information* page via the *Hire* button.

NOTE: This is the first of two releases for manual hire functionality. In this release, basic functionality is provided. In the next release, the remaining options will be available. Work is underway to provide this option in the desktop version and will be available in a future release.

The *Employee Information* page is accessed under *Team > My Team > Employee Information*.

Users must have security permission to access this page and the *Hire* button. This is set under *Company Settings > Profiles/Policies > Security*. The *Employee Information (Edit Screen)* setting under the *HR* tab must be set to *View/Edit* with the *Add* checkbox checked.

Mobile



Supporting Information for Manual Hire

The following information has been added in support of the manual hire process.

Hiring via HR Action

97614: If using the Hire HR Action to hire employees, the available options will be dependent on the sub-systems enabled in your company. For example, within Default Profiles, the available fields will depend on which product is enabled. The availability of HR Action Items will also be affected according to the enabled sub-systems.

Available Default Profiles - HR Only Enabled

- Benefit
- Pay Period
- Security

Available Default Profiles - Payroll Only Enabled

- Benefit
- Pay Period
- Security

Available Default Profiles - TLM Only Enabled

- Pay Period
- Pay Prep
- Security
- Timesheet

Available Default Profiles - Scheduler Only Enabled

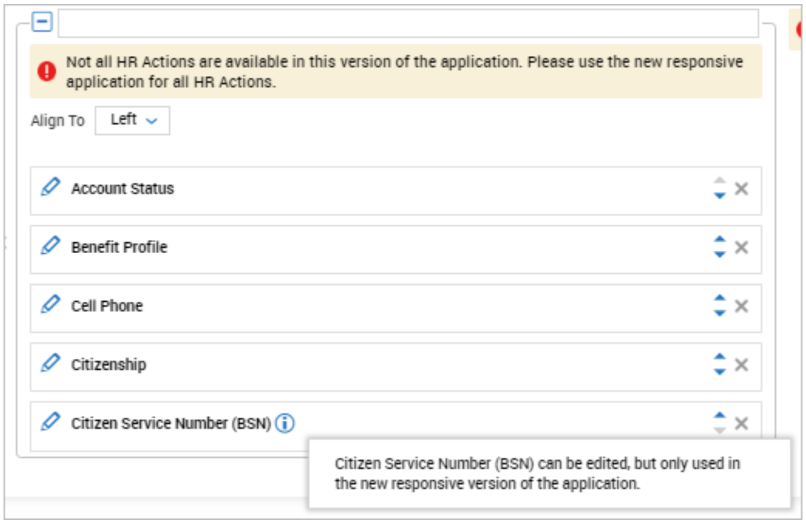
- Security

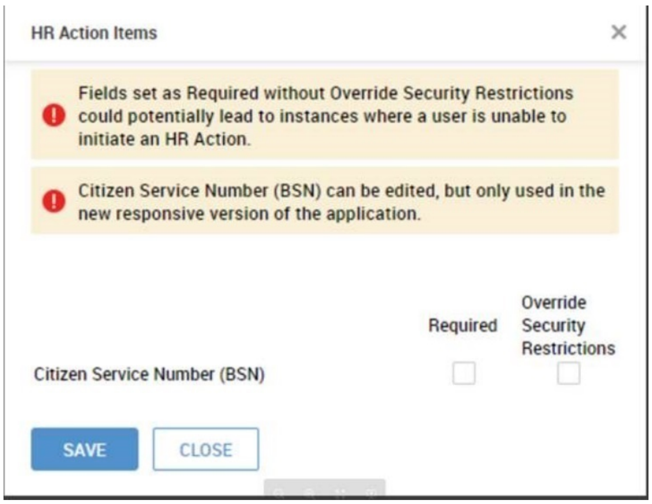
Hiring via HR Actions: Message to Users of Unavailable HR Action Item

97618, 96266: A new HR Action Item for the European market, named ***Citizen Service Number (BSN)*** has been added to the list of available HR Action Items. This item can be used for HR Action Types of Regular, Hire, Re-Hire, Termination, and My Information Action Request. However, this item can only be used with the New UI.

When adding this item to an HR Action within the Classic UI, an information icon will display next to the item. When hovering your mouse over the icon, a message will display explaining that it can only be used with the new responsive version of the application; or New UI.

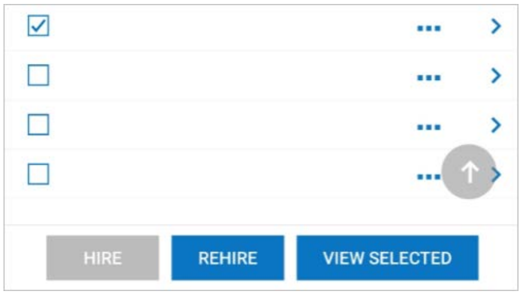
An error message will also display at the top of the list to inform users there is an item in the list that is only supported in the New UI.

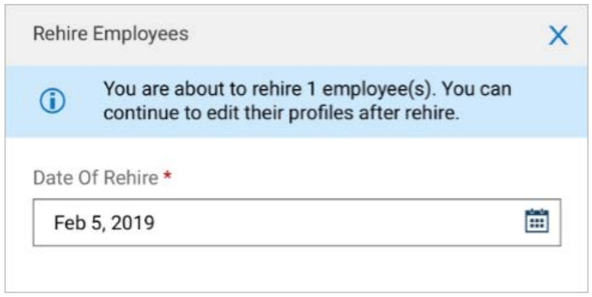


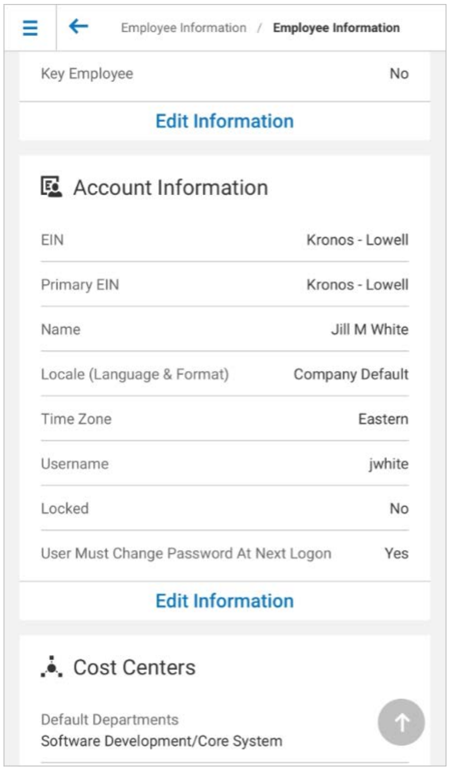


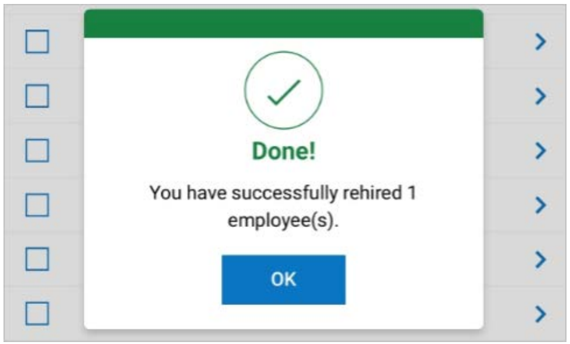
Manual Re-Hire: Re-Hire Action Added in New UI

91168: In addition to the hire functionality, users can also re-hire terminated employees. Managers or administrators will select the terminated employee, select the Rehire button, enter the date of rehire, and then edit the rehired employee as needed.









Employee Maintenance – New UI

The following pages in the Employee Maintenance menu of the New UI now have added functionality. These pages are located under *Team > HR > Employee Maintenance*.

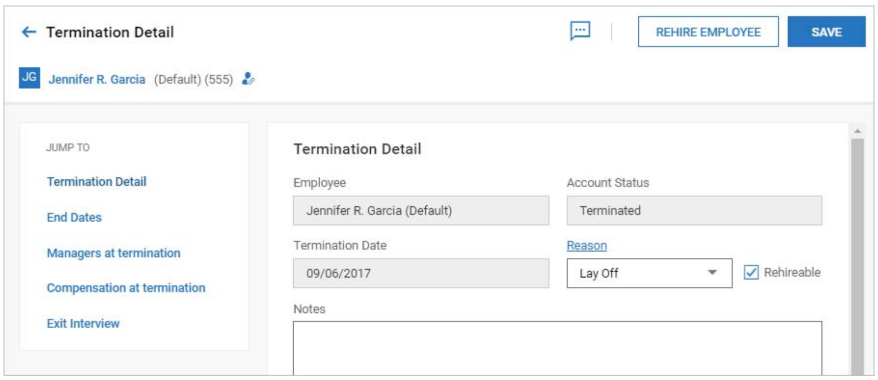
Termination Details: Functionality Added to Termination Details Page in New UI

89930: In the New UI, functionality has been added to the *Termination Details* report page that affects both desktop and mobile. Options have been added to add, delete, view (and then edit) termination detail entries. Additional options are available for Employee Maintenance and Employee Quick Links.

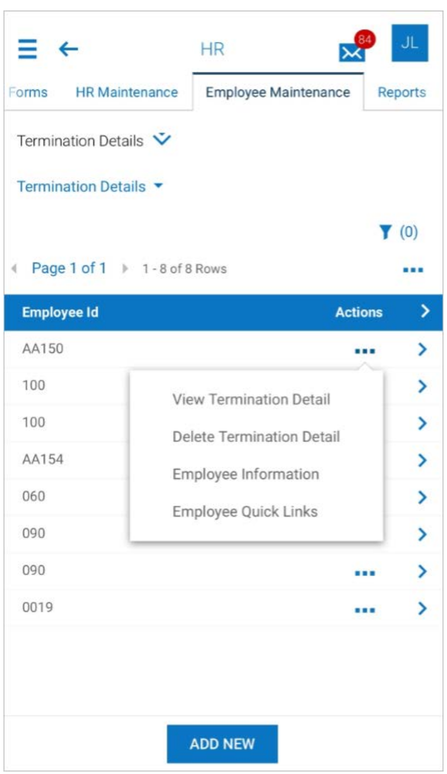
This is located under: *Team > HR > Employee Maintenance > Termination Details*

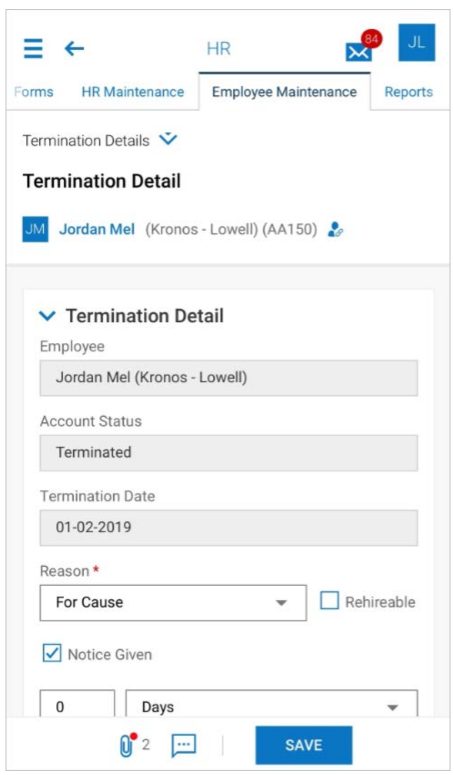
Desktop

In the desktop versions, when clicking the *Edit* icon, the *Termination Detail* page will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. The page contains widgets with *Jump To* links in the left panel. Users can view and/or edit the page, depending on user permissions.



Mobile





HR Actions

The following has been completed for HR Actions.

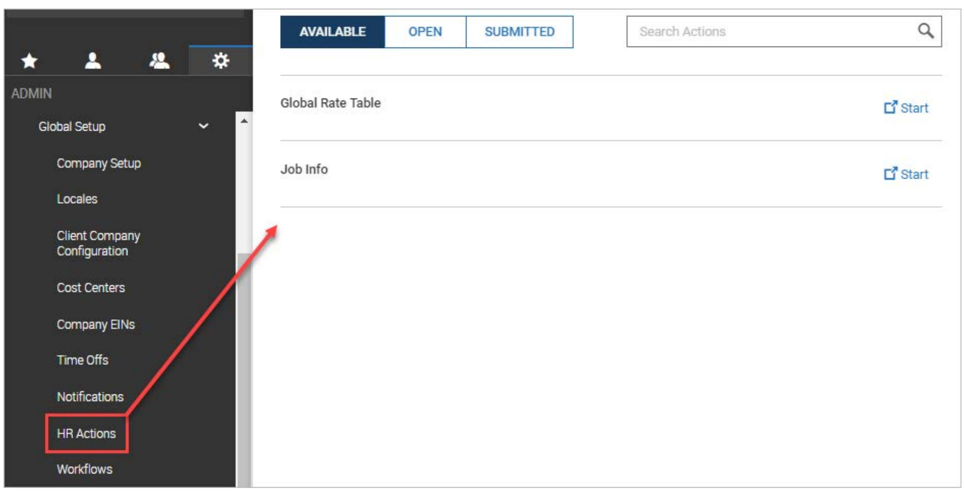
HR Actions: Global Rate Table & Job Info Added to Global Setup in New UI

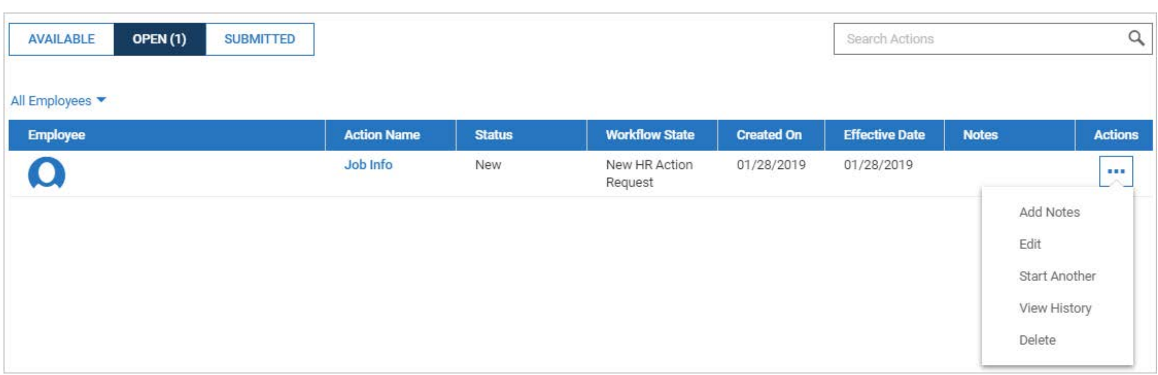
92242 & 92243: In the New UI desktop version, administrators and managers will be able to update a Global Rate Table or Job Info using an HR Action. A new *HR Actions* menu has been added under the *Global Setup* menu under the Gear icon.

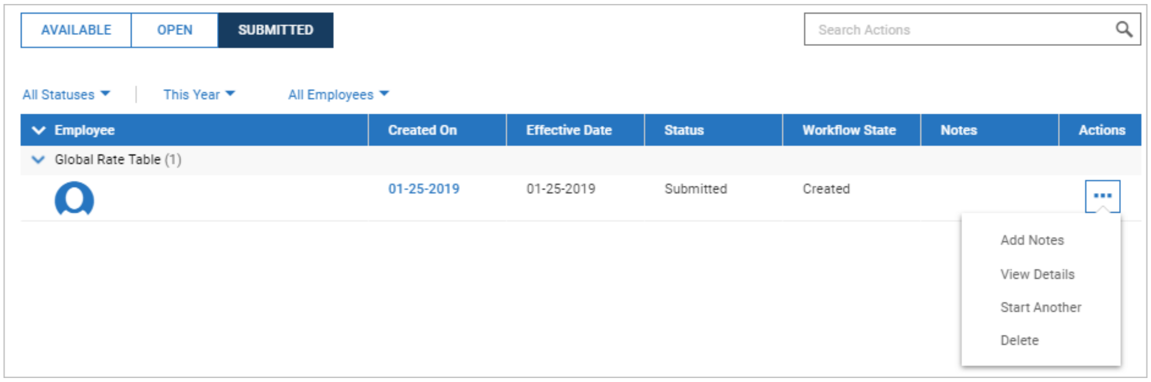
This menu will display all Global Rate Table & Job Info HR Actions.

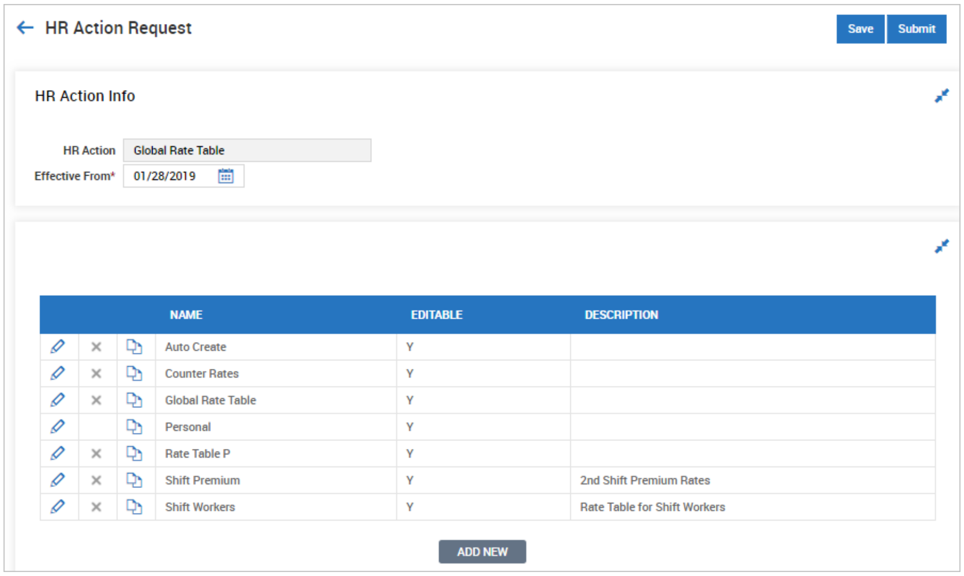
- **Available Tab -** Allows users to start an action under the *Available* tab; and to add notes, view details, start another and delete the action under the *Submitted* tab.
- **Open Tab** – Users can add notes, edit the action, start another action, view the history of the action, or delete the action.
- **Submitted Tab** – After submitting an action, users can add notes, view the details of the action, start another action, or delete the action.

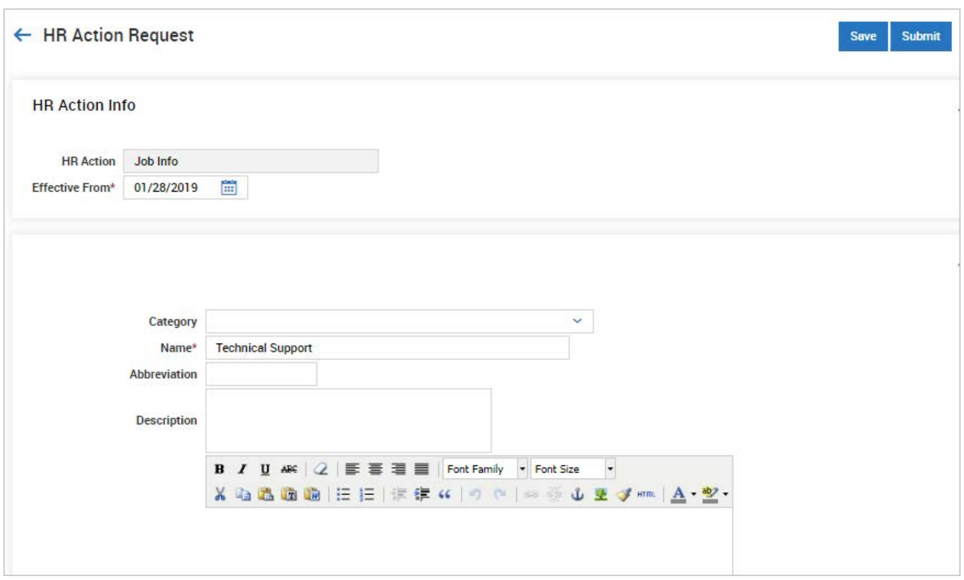
This menu will not allow for the creation of the HR Action itself. HR Actions must still be created under the *Company Settings* menu (Gear icon – *Company Settings > HR Setup > HR Actions*).






AVAILABLE
OPEN
SUBMITTED
Search Actions
All Statuses
This Year
All Employees
Employee
Created On
Effective Date
Status
Workflow State
Notes
Actions
Global Rate Table (1)
01-25-2019
01-25-2019
Submitted
Created
Add Notes
View Details
Start Another
Delete


HR Action Request
Save
Submit
HR Action Info
HR Action
Global Rate Table
Effective From*
01/28/2019
NAME
EDITABLE
DESCRIPTION
Auto Create
Y
Counter Rates
Y
Global Rate Table
Y
Personal
Y
Rate Table P
Y
Shift Premium
Y
2nd Shift Premium Rates
Shift Workers
Y
Rate Table for Shift Workers
ADD NEW


HR Action Request
Save
Submit
HR Action Info
HR Action
Job Info
Effective From*
01/28/2019
Category
Name*
Technical Support
Abbreviation
Description
Font Family
Font Size

HR Maintenance – New UI

The following pages in the HR Maintenance menu of the New UI now have added functionality. These pages are located under *Team > HR > HR Maintenance*.

Assets Assignment: Functionality Added to Assets Assignment Page in New UI

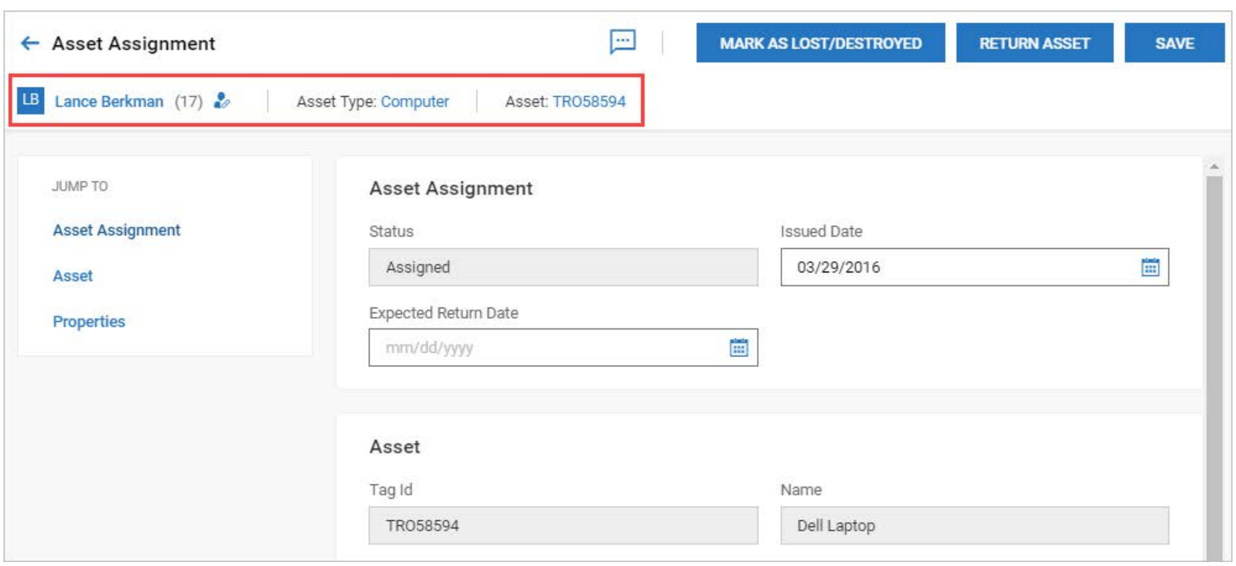
90242: In the New UI, functionality has been added to the *Assets Assignment* report page that affects both desktop and mobile. Options have been added to add, delete, view (and then edit) asset assignments. Additional options are available for Employee Maintenance and Employee Quick Links. Additionally, asset types can be viewed and/or edited.

This is located under: *Team > HR > HR Maintenance > Assets Assignments*

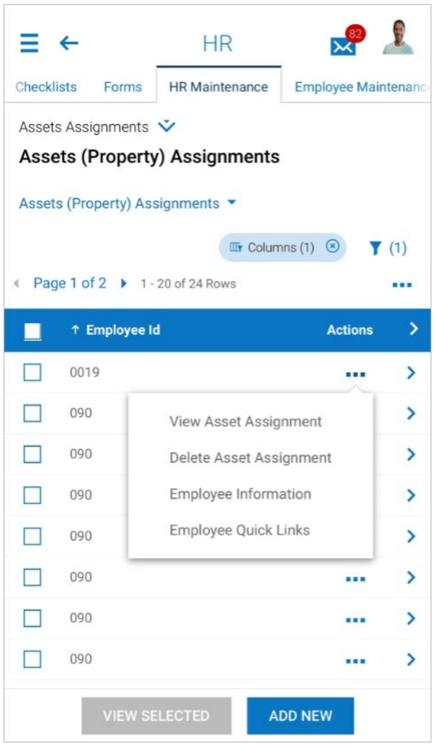
Desktop

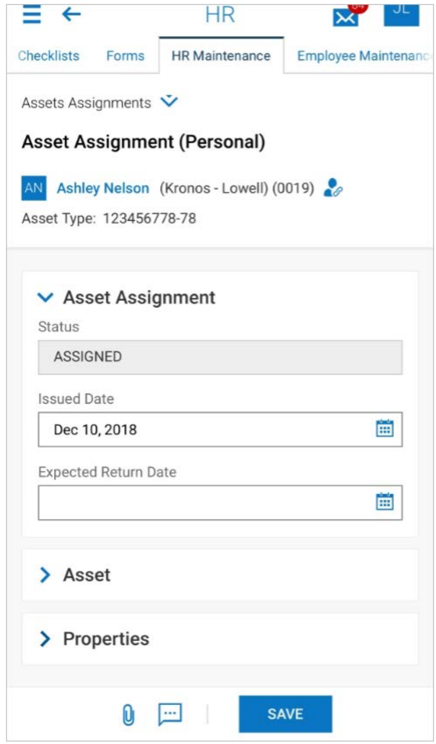
In the desktop versions of the New UI, when clicking the *Edit* icon, the *Asset Assignment* page will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. The employee's assigned *Asset Type* and *Asset* will display as hyperlinked, and when clicked, the user will be taken to the *Asset Type* or *Asset* page where the data can be viewed and/or edited depending on the user's permissions.

Additionally, the asset can be marked as lost/destroyed or returned using the buttons at the top.



Mobile



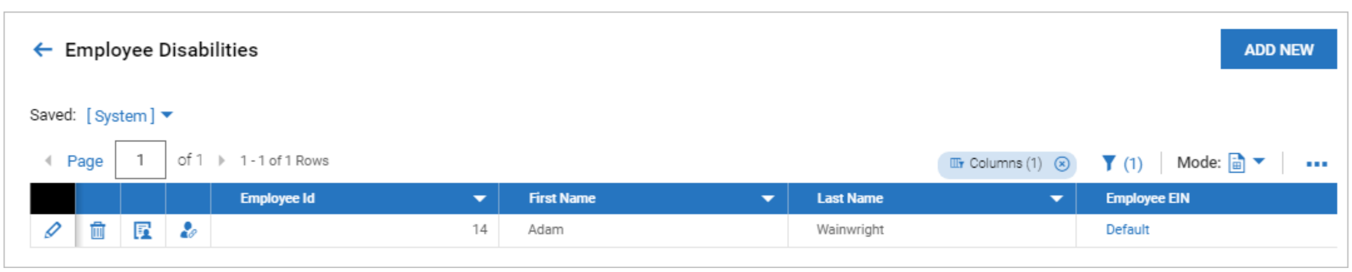


Disabilities: Functionality Added to Disabilities Page in New UI

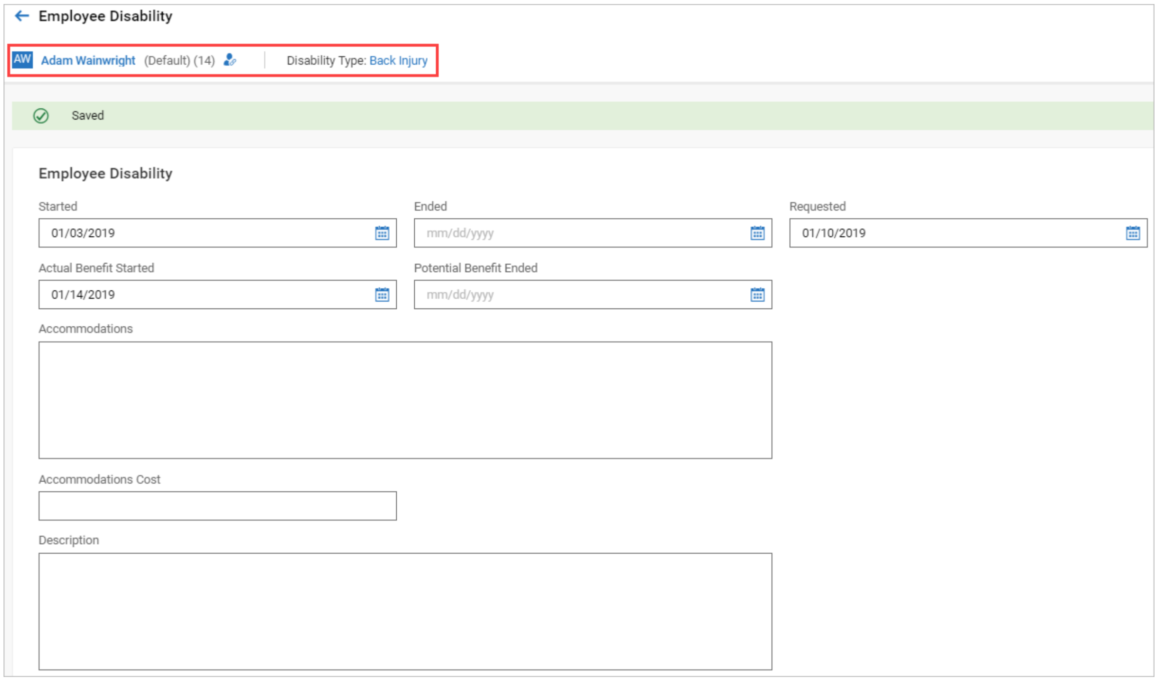
94720: In the New UI, functionality has been added to the *Disabilities* report page that affects both desktop and mobile. Options have been added to add, view and/or edit, and delete disability entries. Additional options are available for Employee Maintenance and Employee Quick Links.

This is located under: *Team > HR > HR Maintenance > Disabilities*

Desktop

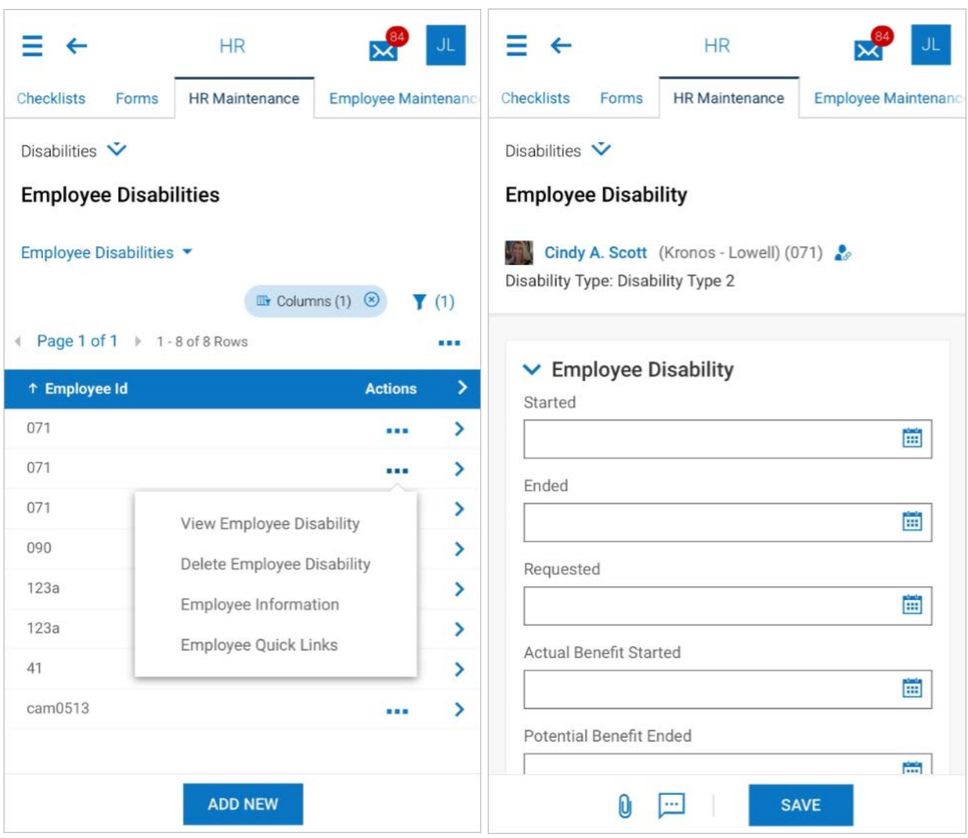


In the desktop versions of the New UI, when clicking the *Edit* icon, the *Employee Disability* page will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. The employee's *Disability Type* will display as hyperlinked, and when clicked, the user will be taken to the *Asset Type* or *Asset* page where the data can be viewed and/or edited depending on the user's permissions.



Employee Disability
AW Adam Wainwright (Default) (14)
Disability Type: Back Injury
Saved
Employee Disability
Started
01/03/2019
Ended
mm/dd/yyyy
Requested
01/10/2019
Actual Benefit Started
01/14/2019
Potential Benefit Ended
mm/dd/yyyy
Accommodations
Accommodations Cost
Description

Mobile



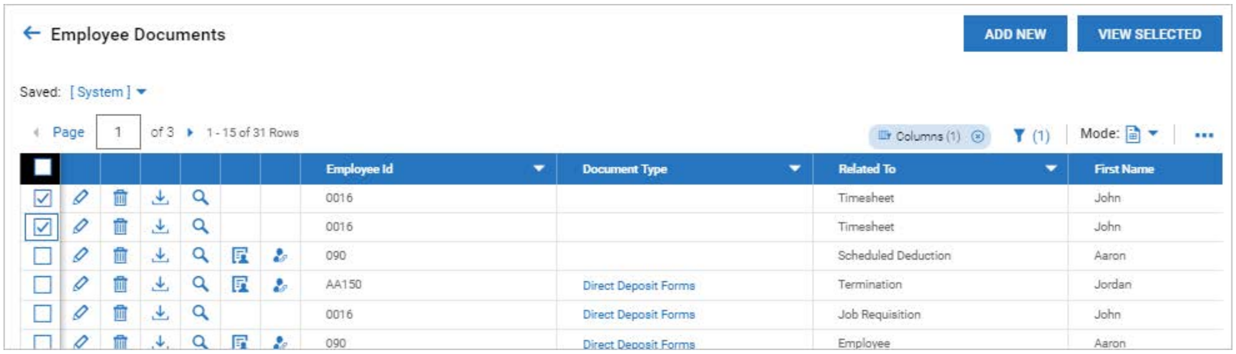
HR
84
JL
Checklists
Forms
HR Maintenance
Employee Maintenanc
Disabilities
Employee Disabilities
Employee Disabilities
Columns (1)
(1)
Page 1 of 1
1 - 8 of 8 Rows
Employee Id
Actions
071
071
071
090
123a
123a
41
cam0513
View Employee Disability
Delete Employee Disability
Employee Information
Employee Quick Links
ADD NEW
HR
84
JL
Checklists
Forms
HR Maintenance
Employee Maintenanc
Disabilities
Employee Disability
Cindy A. Scott (Kronos - Lowell) (071)
Disability Type: Disability Type 2
Employee Disability
Started
Ended
Requested
Actual Benefit Started
Potential Benefit Ended
SAVE

Employee Documents: Functionality Added to Employee Documents in New UI

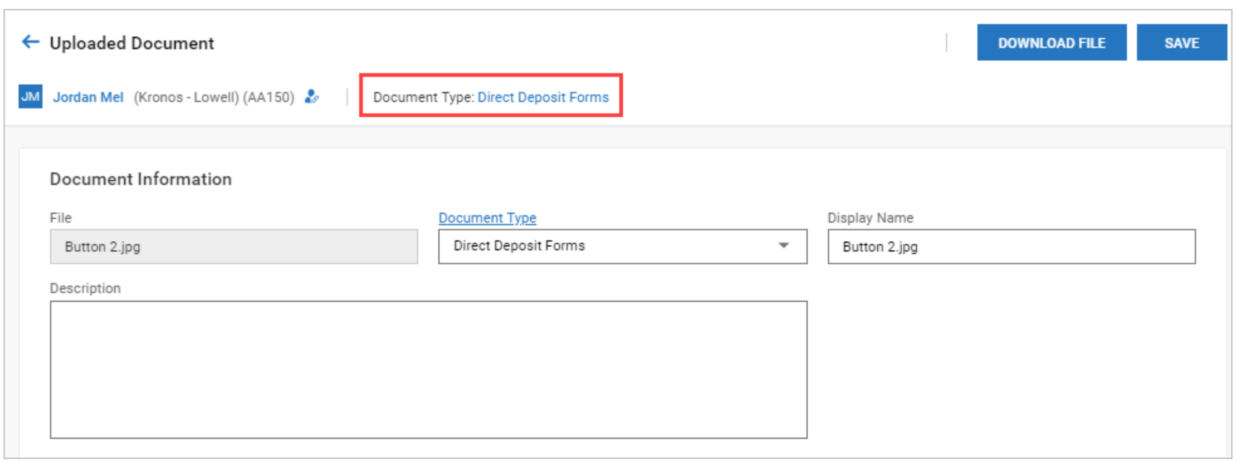
91126: Within the New UI, functionality has been added in the *Employee Documents* report page. This is available in both the desktop and mobile experience. Users can now add, view (and possibly edit), delete, download, view the download history of documents. Additional options are available for Employee Information and Employee Quick Links.

This is located under *Team > HR > HR Maintenance > Employee Documents*.

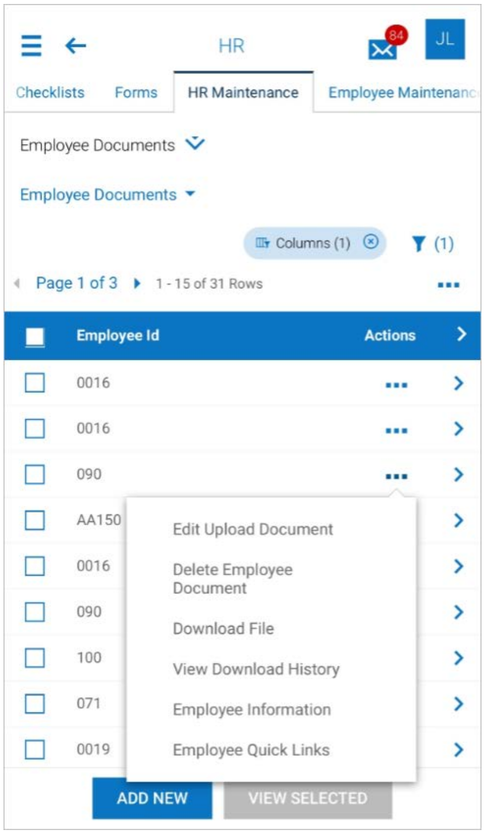
Desktop

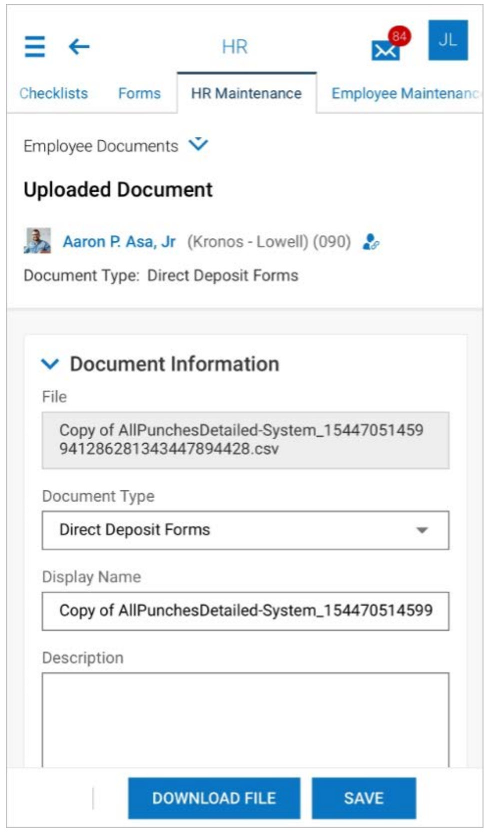


In the desktop versions of the New UI, when viewing the selected document, the *Document Information* page will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. This page also contains a hyperlink for the employee's *Document Type*. When clicked, the user will be taken to the *Document Type* page where the data can be viewed and/or edited depending on the user's permissions.



Mobile



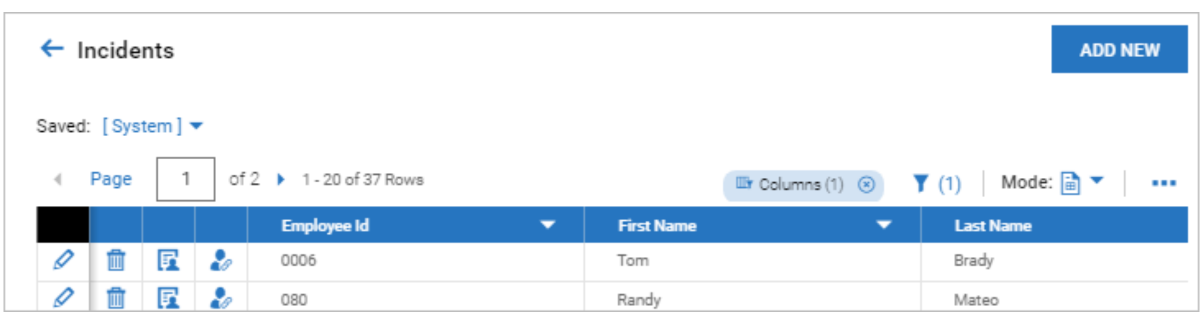


Incidents: Functionality Added to Incidents Page in New UI

89378: The *Incidents* page within the New UI now contains functionality to add, view, delete, and add incidents. In the desktop experience, the page also contains options to link to *Employee Information* and *Employee Quick Links*.

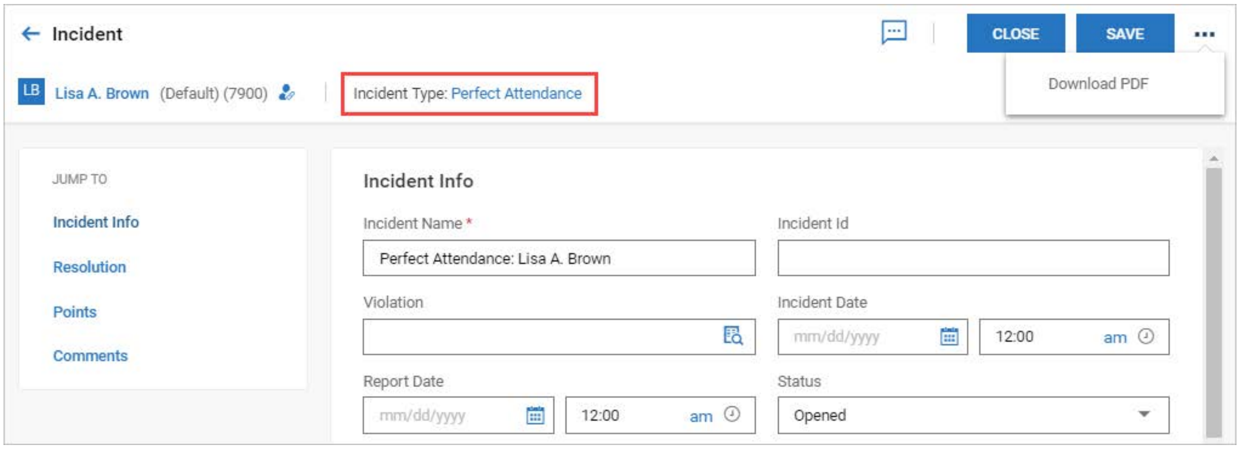
The *Incidents* page, where incidents are assigned to employees, is accessed under *Team > HR > HR Maintenance > Incidents*.

Desktop

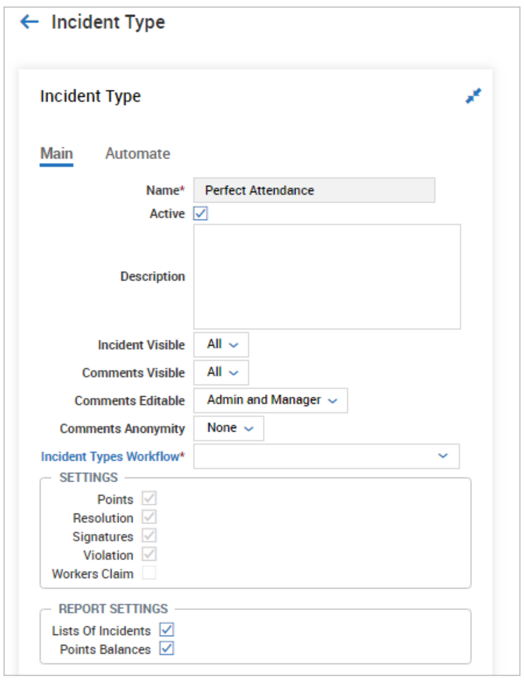


In the desktop versions of the New UI, when clicking the *Edit* icon, the *Incident* page will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. The page will contain a hyperlink for the employee's

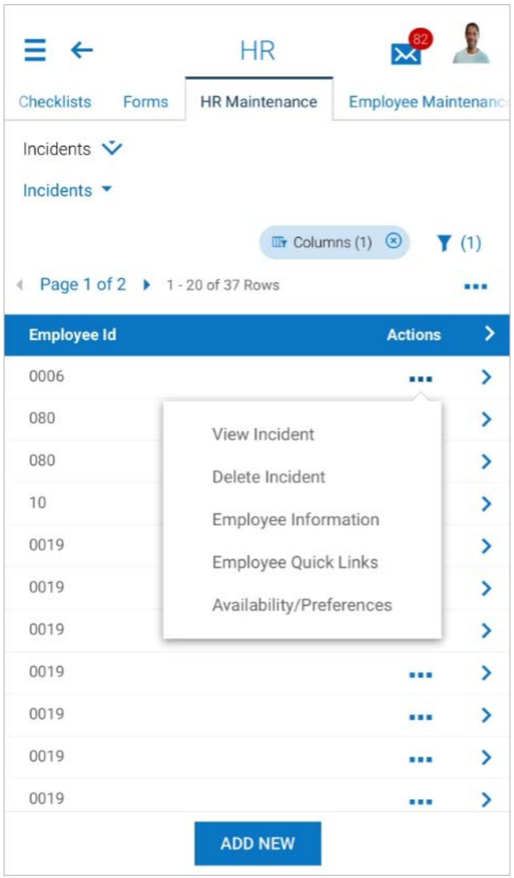
Incident Type. When clicked, the user will be taken to the *Incident* page where the data can be viewed and/or edited depending on the user's permissions.



The *Incident Type* page can be viewed or edited, depending on the user's permissions.



Mobile

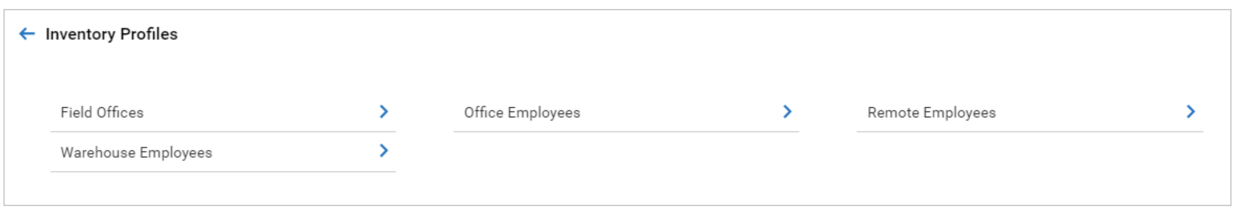


Inventory: Functionality Added to Inventory Page in New UI

92254: In the New UI, functionality has been added to the *Inventory* report page that affects both desktop and mobile. Options have been added to add, delete, view (and then edit) inventory items. Additional options are available for Employee Maintenance and Employee Quick Links. When initially accessing the page in the desktop version, all Inventory Profiles that have been created under Company Settings will display in a new format, making selection easier.

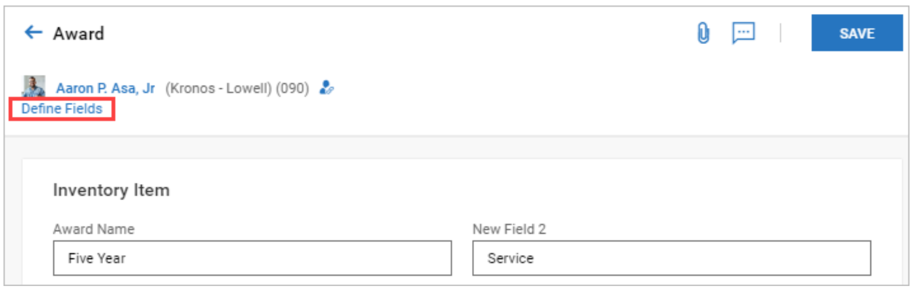
This is located under: *Team > HR > HR Maintenance > Inventory*

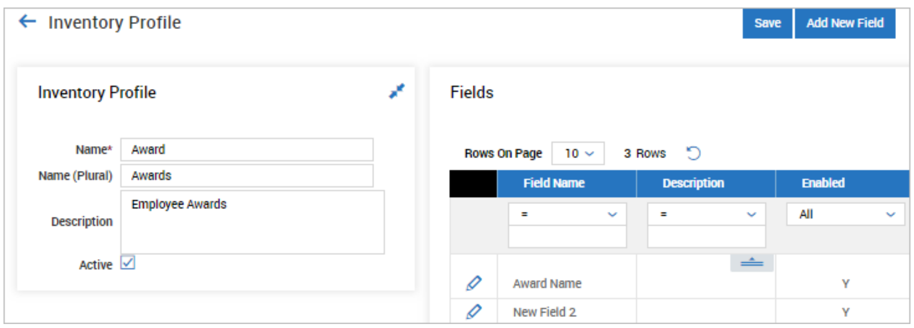
Desktop



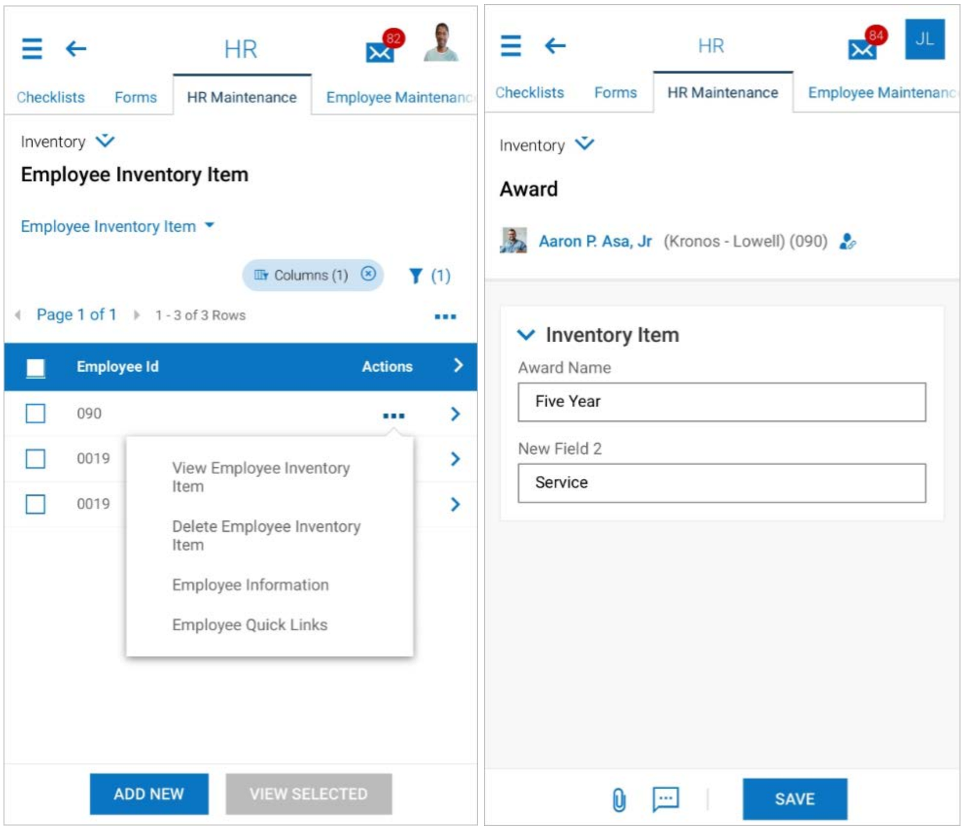
After selecting a profile, the inventory items for that profile will open allowing for viewing/editing or other actions.

In the desktop versions, when clicking the *Edit* icon, the *Inventory Item* page will open for viewing and/or editing, depending on the user's permissions. It will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. A *Define Fields* hyperlink is available, and when clicked, will take the user to the Inventory Profile page where users can add new fields.





Mobile



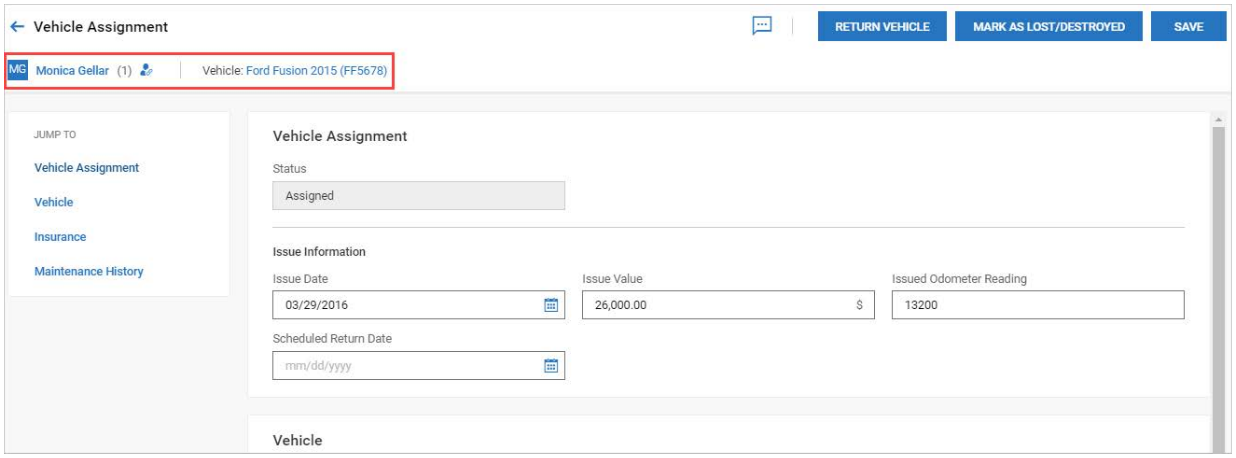
Vehicles: Functionality Added to Vehicles Page in New UI

92147: In the New UI, functionality has been added to the *Vehicles* report page that affects both desktop and mobile. Options have been added to add, delete, view (and then edit) vehicle entries. Additional options are available for Employee Maintenance and Employee Quick Links.

This is located under: *Team > HR > HR Maintenance > Vehicles*

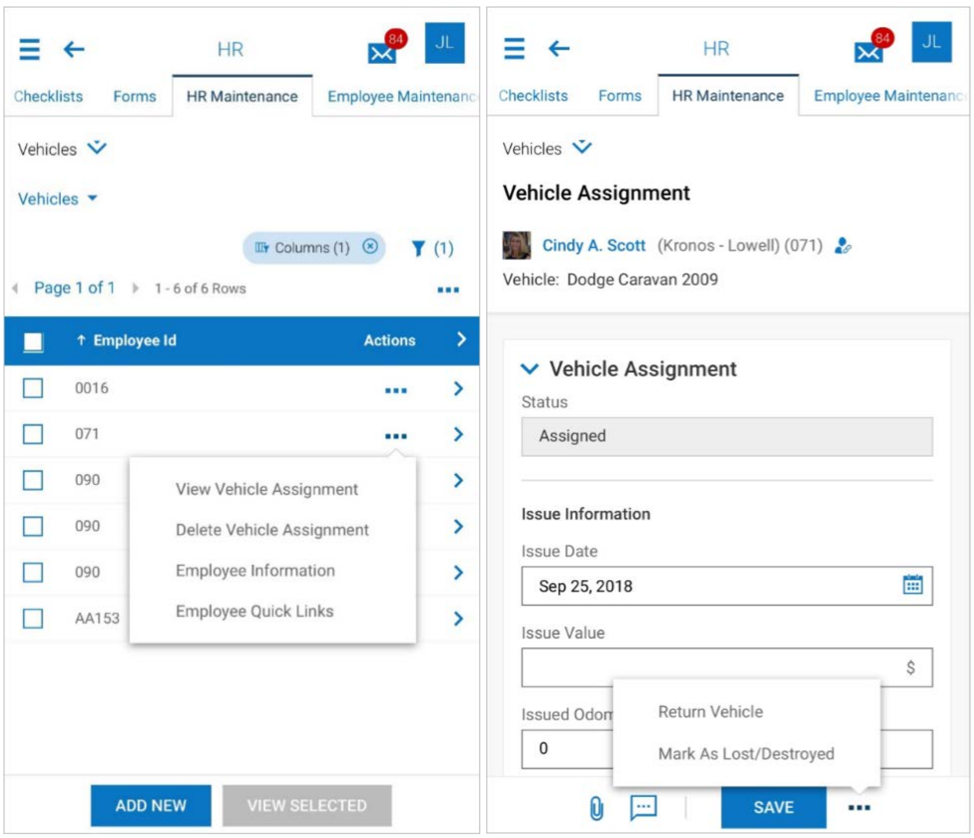
Desktop

In the desktop versions, when clicking the *Edit* icon, the page will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. A hyperlink for the assigned vehicle will be available. When clicked, the system will open the *Vehicle* page where users can view and/or edit the page, depending on their permission. Vehicles can be marked as lost/destroyed or returned by using the buttons on the page.



Vehicle Assignment
RETURN VEHICLE
MARK AS LOST/DESTROYED
SAVE
MG
Monica Gellar (1)
Vehicle: Ford Fusion 2015 (FF5678)
JUMP TO
Vehicle Assignment
Vehicle
Insurance
Maintenance History
Vehicle Assignment
Status
Assigned
Issue Information
Issue Date
03/29/2016
Issue Value
26,000.00
$
Issued Odometer Reading
13200
Scheduled Return Date
mm/dd/yyyy
Vehicle

Mobile



HR
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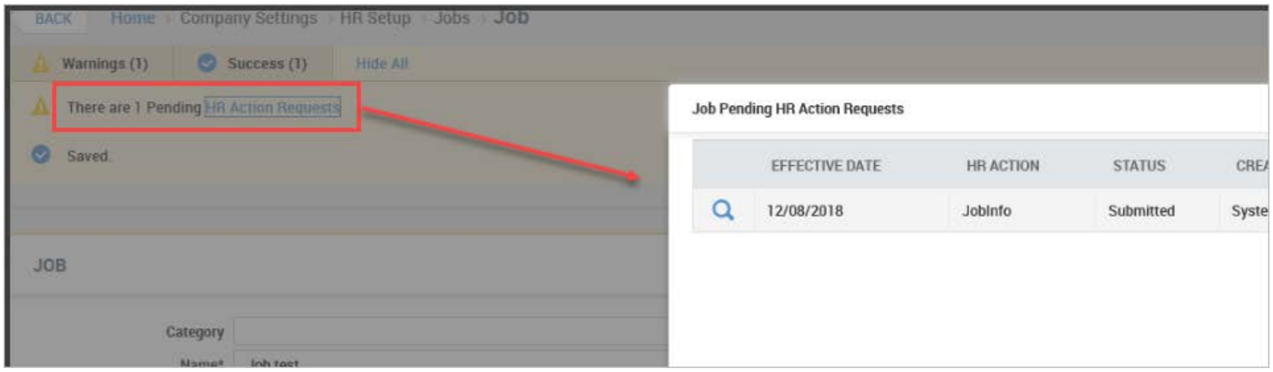
Checklists
Forms
HR Maintenance
Employee Maintenanc
Vehicles
Vehicles
Columns (1)
(1)
Page 1 of 1
1 - 6 of 6 Rows
Employee Id
Actions
0016
071
090
090
090
AA153
View Vehicle Assignment
Delete Vehicle Assignment
Employee Information
Employee Quick Links
ADD NEW
VIEW SELECTED
HR
84
JL
Checklists
Forms
HR Maintenance
Employee Maintenanc
Vehicles
Vehicle Assignment
Cindy A. Scott
(Kronos - Lowell) (071)
Vehicle: Dodge Caravan 2009
Vehicle Assignment
Status
Assigned
Issue Information
Issue Date
Sep 25, 2018
Issue Value
$
Issued Odom
0
Return Vehicle
Mark As Lost/Destroyed
SAVE

Jobs

The following enhancements have been completed for HR Jobs.

Pending HR Action Requests Warning Added to Jobs

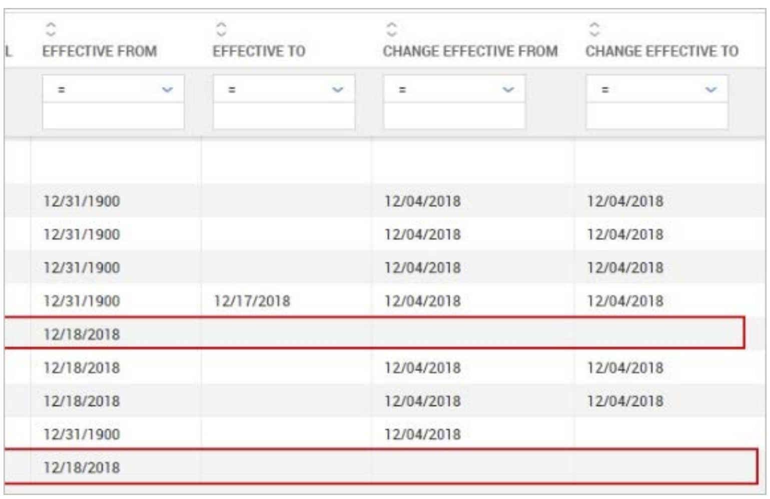
93088: A new warning message to inform users of Jobs with pending HR Action requests has been added to the *Jobs* page. The warning will display when opening the page.



Info Added to Job Info History Report Page

92887: Within the Job Info History report page, effective dates will now be listed when a Job Info HR Action is used to change the effective date(s) in a Job setup.

This page is access from *Company Settings > HR Setup > Jobs*, and then editing a Job, and selecting the *Job Info History* button.



EFFECTIVE FROM	EFFECTIVE TO	CHANGE EFFECTIVE FROM	CHANGE EFFECTIVE TO
12/31/1900		12/04/2018	12/04/2018
12/31/1900		12/04/2018	12/04/2018
12/31/1900		12/04/2018	12/04/2018
12/31/1900	12/17/2018	12/04/2018	12/04/2018
12/18/2018			
12/18/2018		12/04/2018	12/04/2018
12/18/2018		12/04/2018	12/04/2018
12/31/1900		12/04/2018	
12/18/2018			

Learning – New UI

The following pages in the Learning menu of the New UI now have added functionality. These pages are located under *Team > Learning*.

Education: Functionality Added to Education Page in New UI

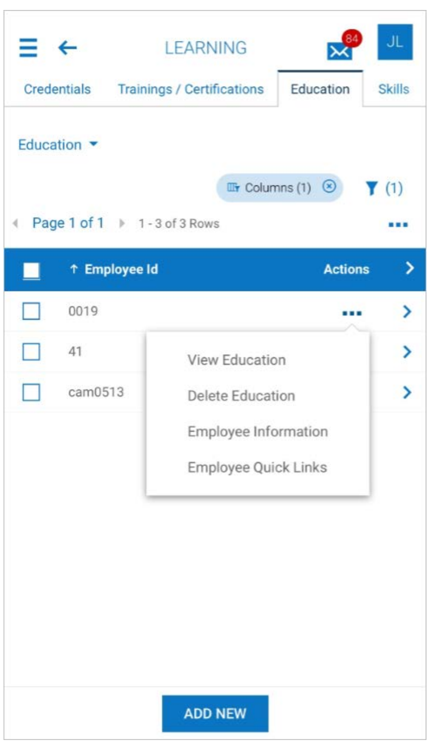
99744: In the New UI, functionality has been added to the *Education* report page that affects both desktop and mobile. Options have been added to add, delete, view (and then edit) inventory items. Additional options are available for Employee Maintenance and Employee Quick Links.

This is located under: *Team > Learning > Education*

Desktop

When clicking the *Edit* icon to view and/or edit an employee, the Education page will contain a hyperlinked employee name, and when clicked, will open the employee's account. Next to the employee's name is an Employee Quick Links icon. This page contains options to add notes and upload supporting documents.

Mobile



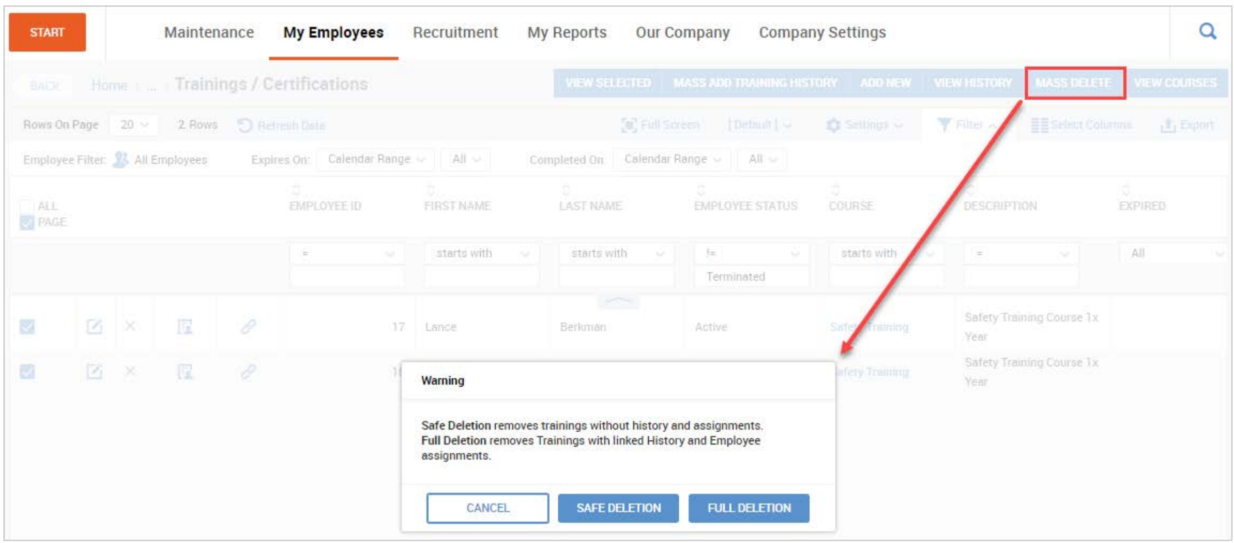
Trainings/Certifications: Mass Delete Added

94601: We have added the ability for administrators and managers to mass delete trainings and certifications. A new ***Mass Delete*** button has been added. After selecting the records to be mass deleted and clicking the button, a warning pop-up will display with two delete options.

- **Safe Deletion** – Will remove trainings/certifications without removing the history and assignments tied to them.
- **Full Deletion** – Will remove trainings/certifications containing linked history and assignments.

NOTE: This is available in both the Classic UI and New UI Desktop environments. It is not yet available in the New UI Mobile environment.

- In the New UI, this is available under *Team > Learning > Trainings/Certifications*.
- In the Classic UI, this is available under *My Employees > Employee HR Maintenance > Trainings/Certifications*.



Position Management

The following enhancements have been completed for Position Management.

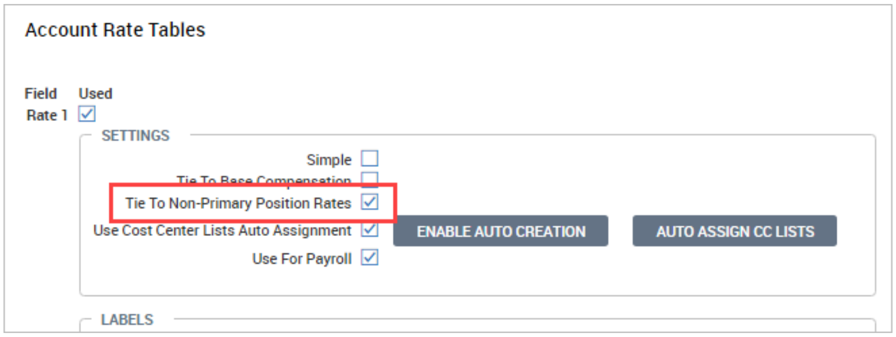
New Setting to Assign Rate Table to Non-Primary Positions

96579 & 96615: Companies can now assign separate rates to employees for a non-primary position while assigning them to a Position. In the *Settings* section of the *Account Rate Tables* widget of *Company Setup*, a new ***Tie To Non-Primary Position Rates*** setting has been added.

When checked, the rates entered for non-primary position assignments will be automatically added to the employee's personal rate table.

Rate tables for the company are enabled in the *Account Rate Tables* widget under *Company Settings > Global Setup > Company Setup*. Up to 5 rate tables can be enabled.

Only one table at a time can be tied to non-primary position rates. While you can select which rate table should be used for creating non-primary position rates in the selected employee's personal rate table, if a rate table has not been enabled at the company level, users will not be allowed to enter rates into the assignment screen.



Security Permission

Use of this setting requires the enablement and use of Position Management. For users to be able to access this functionality, their security profiles must have the following security permission enabled in their security profile.

- *Company Settings* > *Profiles/Policies* > *Security*: *HR* tab > *Rates* section > *View/Edit Rate Tables* set to *View/Edit*.

Addition of Rates in Positions/Position Assignments & Updating of Rate Tables

96623, 88541, 98395: Within the ***Assignments To Positions*** widget in employee accounts, or in the ***Employees Assigned To The Position*** widget within the position screen, when adding or editing an employee assignment, we have added a rates section and is dependent on whether the ***Is Primary Assignment*** setting is checked or unchecked.

- **Unchecked -** When unchecked, this assignment will be considered a non-primary assignment and a new rate section will become available to add rates after selecting a position in the *Position* drop-down.
- **Checked -** If checked, the assignment will be processed as the employee's primary assignment and no rates can be added to the assignment via the new rate section.

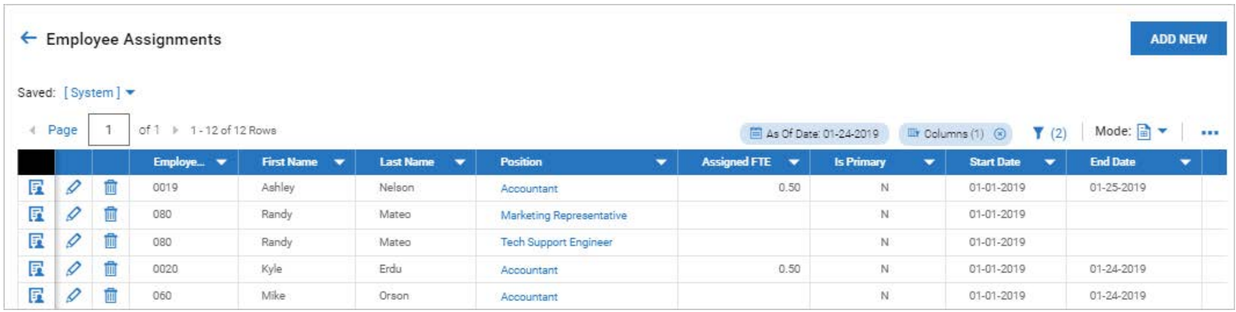
This functionality will be available in all user interfaces and is dependent on rate tables being enabled and tied to non-primary position rates as described above in 96579 & 96615. When adding/editing an assignment from the Classic UI, or the New UI, the assignment page will present as a pop-up page.

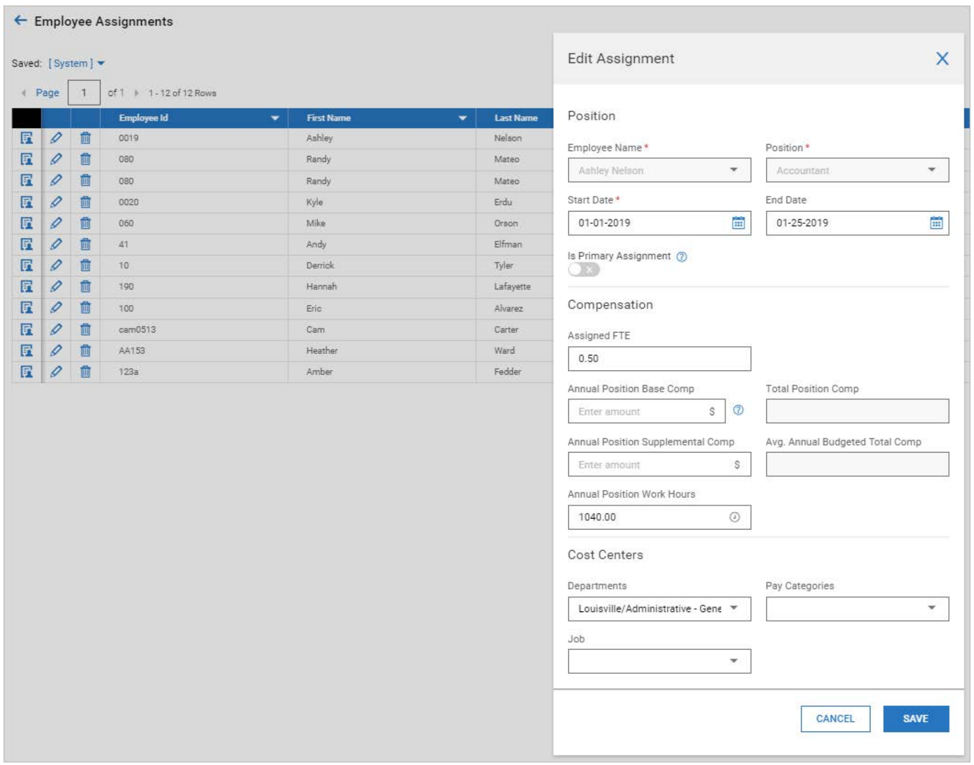
NOTE: In this release, rates can be added by editing the assignment in the ***Assignment To Positions*** widget in employee accounts under Employee Information, and in the ***Employees Assigned To The Position*** widget in the *Position* page. In a future release, we will be adding the ability to include the rates when creating a new assignment in the *Employee Assignments* page, located under *Team* > *Employee Assignments*.

Employee Assignments Report Page

94463 & 94461: From the *Employee Assignments* page, users can add, edit, and delete position assignments. Additionally, an Employee Information icon is available to access employee accounts. In the *Position* column, the entries are hyperlinked, and when clicked, will take the user to the *Position* page where the details of the position can be viewed and/or edited, depending on the user's editing rights.

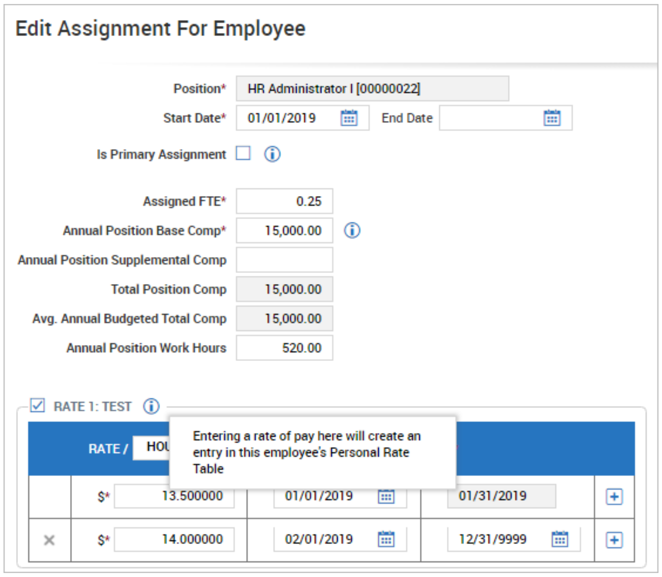
The edit icon will result in a pop-up where the assignment can be viewed/and or edited.





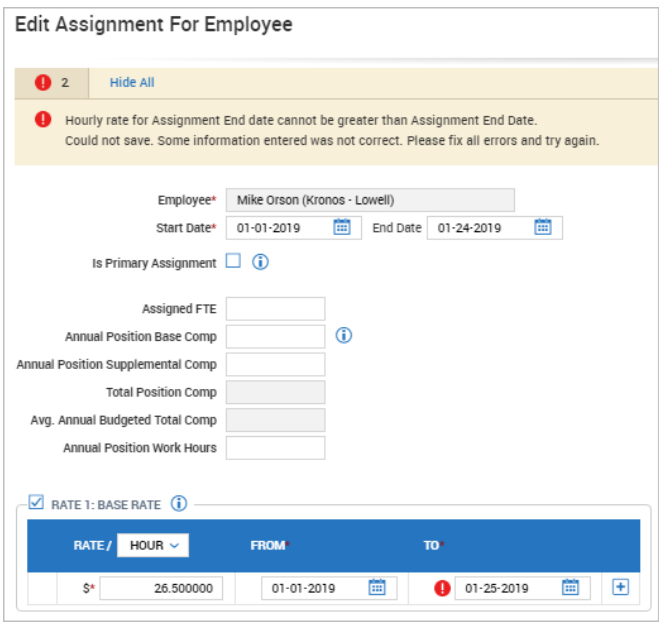
Rate Section in Assignments

For non-primary positions, you can check the checkbox in the *Rate* section and add one or more hourly rates with a required *From* date and an optional *To* date. When saved, the system will update the employee's personal rate table in the *Base Compensation* widget of their employee accounts.

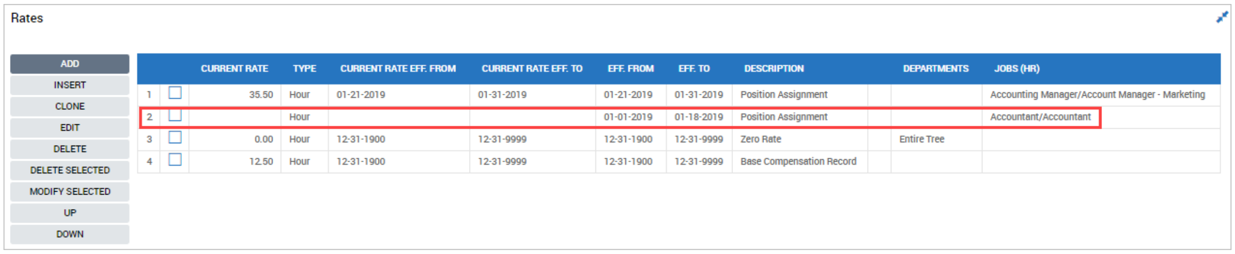


End Dating Assignment and Availability of Editing Rate Table

When end-dating a non-primary assignment, the rate listed must have a *To* date listed that is not greater than the *End Date* of the assignment.



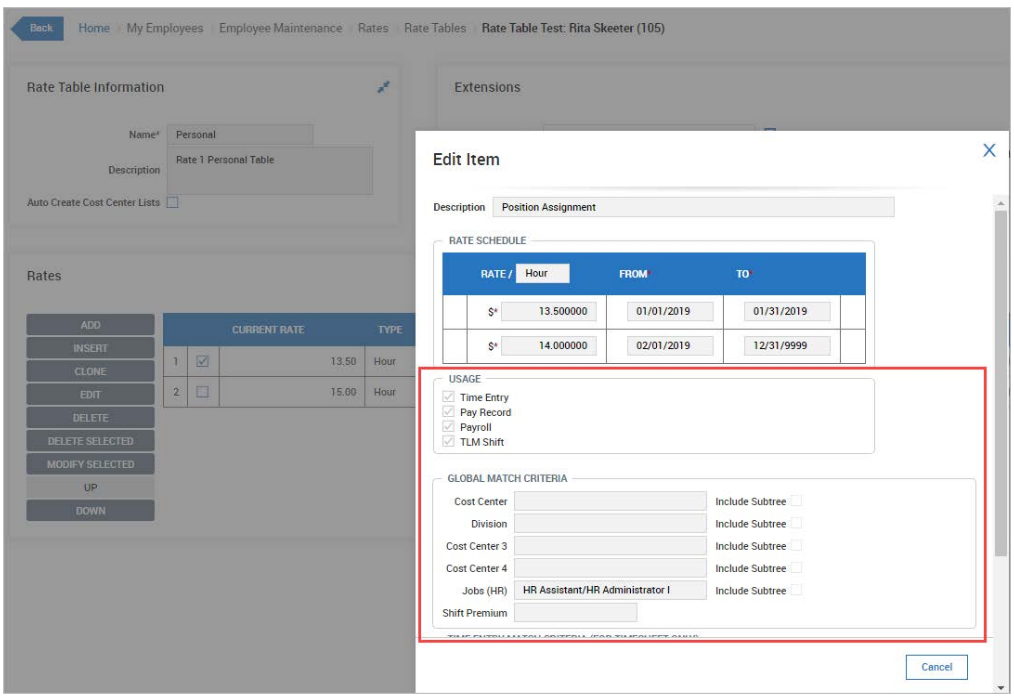
When the rate has expired, meaning that the *To* date has passed, the rate shown in the employee's Personal Rate Table will no longer display, but the assignment will remain in the list for reference.



		CURRENT RATE	TYPE	CURRENT RATE EFF. FROM	CURRENT RATE EFF. TO	EFF. FROM	EFF. TO	DESCRIPTION	DEPARTMENTS	JOBS (HR)
1	☐	35.50	Hour	01-21-2019	01-31-2019	01-21-2019	01-31-2019	Position Assignment		Accounting Manager/Account Manager - Marketing
2	☐		Hour			01-01-2019	01-18-2019	Position Assignment		Accountant/Accountant
3	☐	0.00	Hour	12-31-1900	12-31-9999	12-31-1900	12-31-9999	Zero Rate	Entire Tree	
4	☐	12.50	Hour	12-31-1900	12-31-9999	12-31-1900	12-31-9999	Base Compensation Record		

Editing of Personal Rate Table

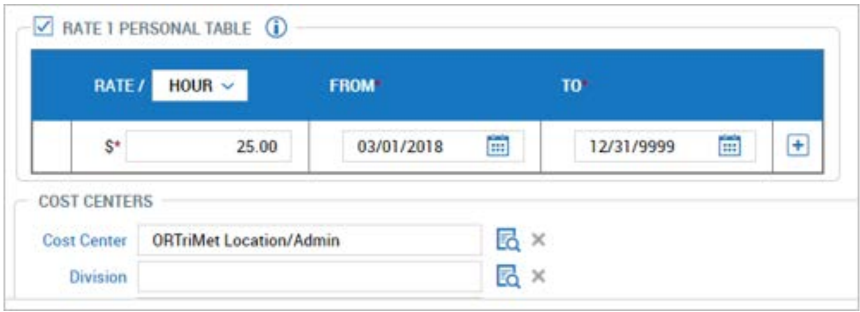
When a position related rate entry has been added to an employee's Personal Rate Table within the *Base Compensation* widget of the employee account, users will be unable to edit any information on this pop-up (it will be read only.) If the entry needs to be updated or end-dated, users must go to the Position Assignment to make the changes.

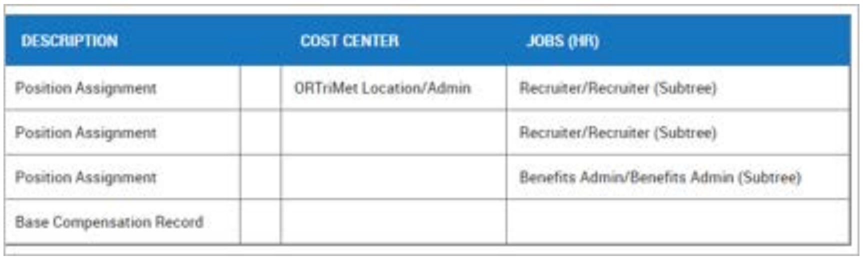


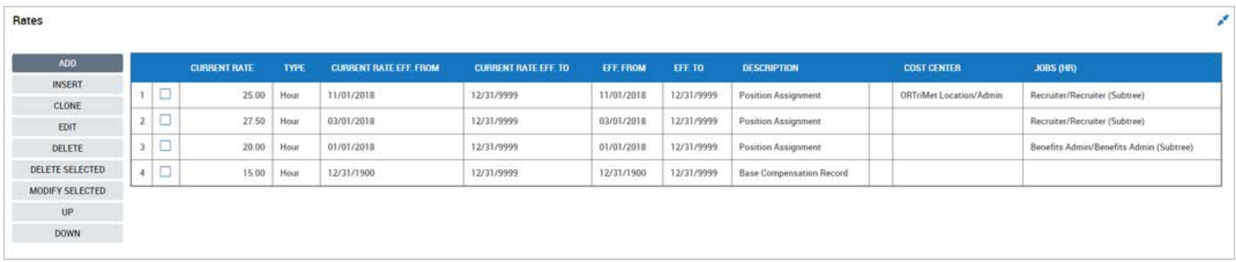
Adding Cost Centers to a Position Assignment

96890: In addition to the new rates section described above, cost centers can be added, along with rates to non-primary position assignments. For example, if an employee is assigned to two non-primary positions, you can add or edit another non-primary position and add cost center information. When saved, the rates and the cost center information will update the employee's personal rate table.

In the example below, the employee has two non-primary assignments as Recruiter. One position has no additional cost center assignments, but the other non-primary Recruiter position does. When the employee's personal rate table is updated, the additional cost center information will be included, along with the rates.



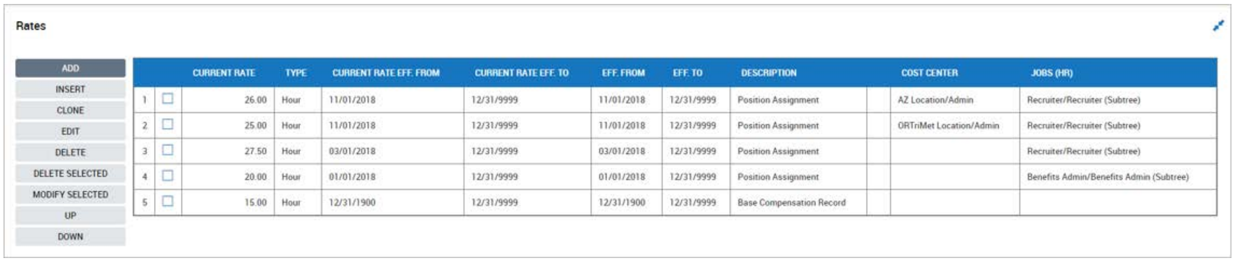




Position Related Rate Entries Order in Personal Rate Tables

98396 & 83146: When a user saves a non-primary position assignment containing a rate for the position specified, this will automatically create an entry in the employee's Personal Rate Table. The order of the rate entries will be as follows.

1. At the time an employee is hired and given a base compensation amount, a personal rate table is created automatically by the system for the employee. This table is set with the employee's hourly rate as row 1 with a description of Base Compensation.
2. When an employee is assigned to a position and the position is marked as primary, the system matches the Base Compensation with the employee's rate for this position. No new row is created.
3. When another position assignment is added and designated as non-primary with a rate different from the employee's Base Compensation rate, a new row is added to the employee's personal rate table. This row will be placed in row 1, and the Base Compensation row will move to row 2.
4. As more non-primary position assignments with alternate rates are added, each addition will be placed in row 1, and the previous entry in row 1, will move down to row 2. The entry in row 2 will move to row 3. If even more additions are made, the entries will move down one row as the new entry is placed in row 1.


Rates

ADD
INSERT
CLONE
EDIT
DELETE
DELETE SELECTED
MODIFY SELECTED
UP
DOWN

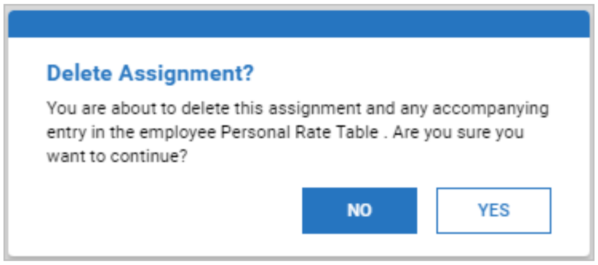
	CURRENT RATE	TYPE	CURRENT RATE EFF. FROM	CURRENT RATE EFF. TO	EFF. FROM	EFF. TO	DESCRIPTION	COST CENTER	JOBS (HR)
1	26.00	Hour	11/01/2018	12/31/9999	11/01/2018	12/31/9999	Position Assignment	AZ Location/Admin	Recruiter/Recruiter (Subtree)
2	25.00	Hour	11/01/2018	12/31/9999	11/01/2018	12/31/9999	Position Assignment	ORTriMet Location/Admin	Recruiter/Recruiter (Subtree)
3	27.50	Hour	03/01/2018	12/31/9999	03/01/2018	12/31/9999	Position Assignment		Recruiter/Recruiter (Subtree)
4	20.00	Hour	01/01/2018	12/31/9999	01/01/2018	12/31/9999	Position Assignment		Benefits Admin/Benefits Admin (Subtree)
5	15.00	Hour	12/31/1900	12/31/9999	12/31/1900	12/31/9999	Base Compensation Record		

Deleting Assignments and Associated Entries in Employee Personal Rate Tables

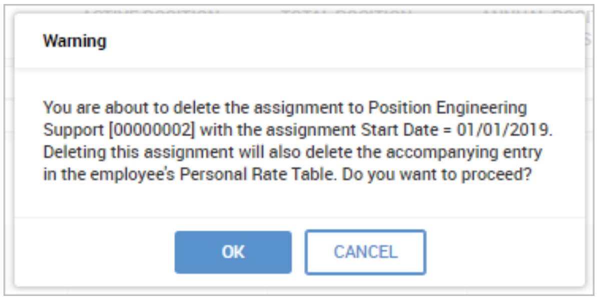
98394 & 98393: Previously, when a position assignment was deleted that also had an associated rate within an employee's personal rate table, users had to first delete the assignment, and then navigate to the rate table and manually delete the rate entry.

In this release, we will now support the automatic deletion of associated rates in employee personal rates tables when their position assignment has been deleted.

In the New UI, when deleting an assignment under *Team > My Team > Employee Assignments*, a warning message will be presented, explaining that rates will be deleted along with the deletion of the assignment.



The same functionality described above for the New UI is also available in the Classic UI. In the Classic UI, position assignments are assigned and deleted from the *Assignments To Positions* widget in employee accounts under *Employee Information*. When deleting an assignment with associated rates, a warning message will be generated and displayed.



Use Position Start Date for Effective Date in Job Change History Widget

93422: Previously, if a user changed the *Default Job* for an employee, this updated the *Job Change History* widget in employee accounts. The *Effective Date* used in the *Job Change History* widget was the date the change was made since there are no effective dates for Jobs. However, if the *Default Job* was changed via an HR Action, the *Effective Date* of the HR Action was used as the *Effective Date* in the *Job Change History* widget.

In this release, we have updated the behavior of the *Job Change History* widget as follows. This update will allow you to more accurately reflect the job changes for your employees.

If the *Default Job* is changed because of a primary position assignment, the *Effective Date* in the *Job Change History* widget will use the *Start Date* of the assignment as the *Effective Date*; just as changes made via HR Actions use the action's *Effective Date* to update the *Effective Date* in the widget.

Use Primary Position Start Date as Job Last Changed Date

93445: Previously, if a user changed the *Default Job* for an employee, this updated the *Job Last Changed* date field. The *Job Last Changed* date updated to the date the change was made since there are no effective dates for Jobs. However, if the *Default Job* was changed via an HR Action, the *Effective Date* of the HR Action was used for the *Job Last Changed* date field.

In this release, we have updated the behavior of the *Job Last Changed* field. This will allow you to more accurately reflect the job changes for your employees.

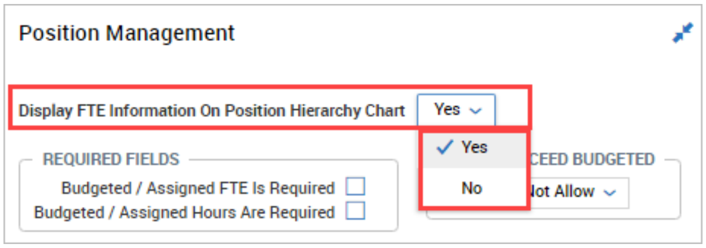
If the *Default Job* is changed because of a primary position assignment, the *Job Last Changed* field will now use the *Start Date* of the assignment; just as changes made via HR Actions use the action's *Effective Date* to update the *Effective Date* in the widget.

Position Hierarchy Chart

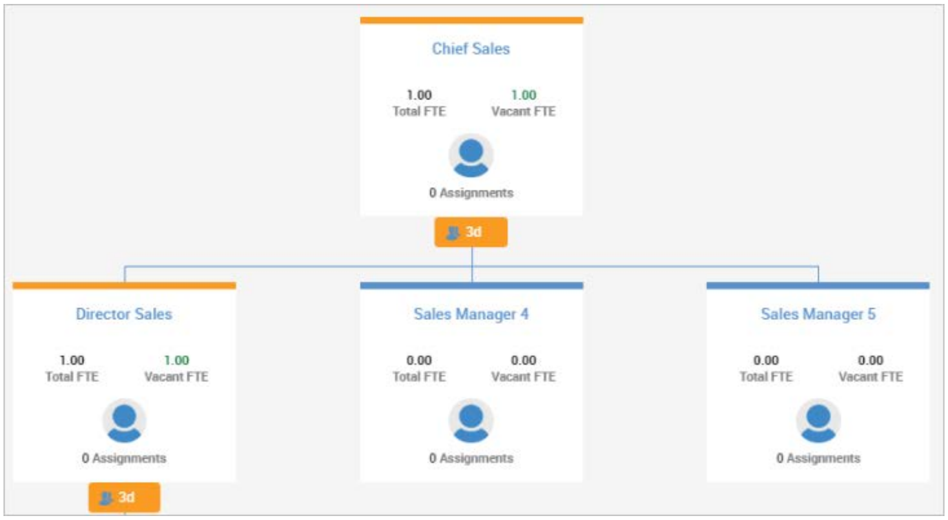
The following enhancements have been added in support of the Position Hierarchy Chart.

Position Management: Hide/Show FTE in Hierarchy Chart

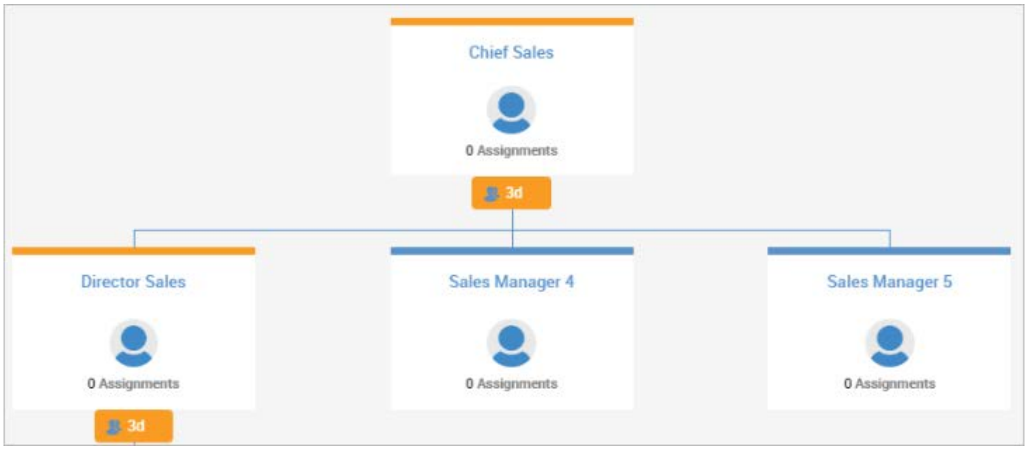
92985: A new setting in Company Setup will allows users to control whether FTE information will display within the Position Hierarchy Chart. The setting can be set to Yes or No and will control the display of this information for the entire company.



Set to Yes



Set to No



Position Hierarchy Chart: Updating Direct Reports in Chart

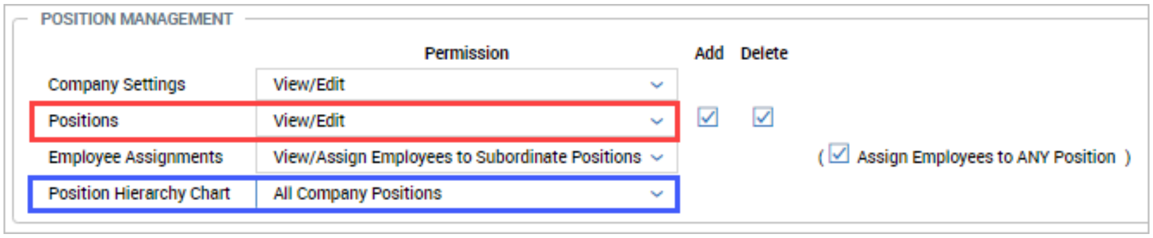
78612: Users with proper security permissions can now update who an employee directly reports to within the Position Hierarchy Chart. For these users, a triple dot icon will display next to Positions. When clicked, the ***Update Directly Reports To*** option will display. When selected, a pop-up will display and a drop-down will allow for the selection of a new direct report for the position.

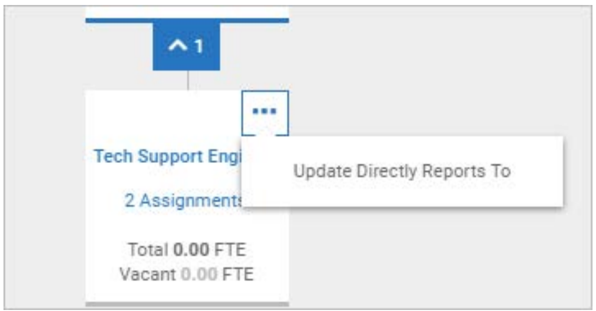
If there are any subordinate positions attached to the one being changed, those will also be moved to the new position. For example, if Position C reports to Position B, and Position B reports to Position A, and you change Position B to report to Position D, Position C will also move over to that section on the hierarchy chart.

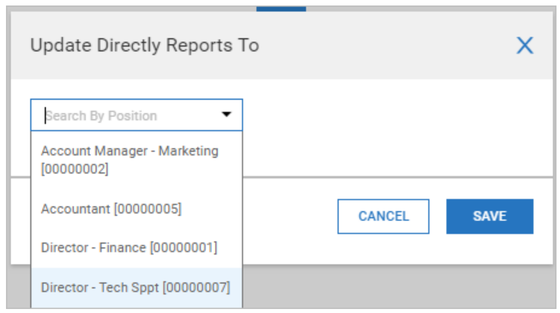
Certain security settings should be enabled for users to be able to access positions within the chart.

- **Groups -** The group the user is assigned to should allow access to Positions.
- **Positions -** View/Edit
- ***Position Hierarchy Chart** – All Company Positions.

*It is not required that users have access to all company positions in the Position Hierarchy Chart to see all the company Positions; however, if this setting is not set to *All Company Positions*, users may not have access to the new position they want to edit.





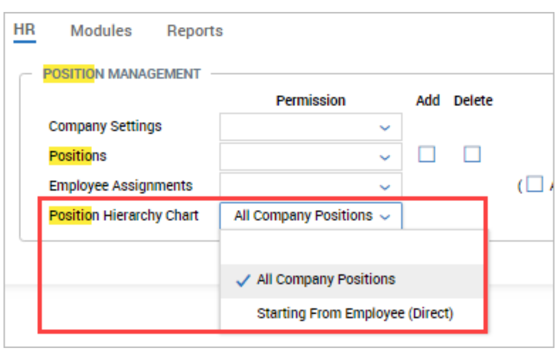


New Security Settings for Position Hierarchy Chart

79191: New security settings are available to control how users view information in the Position Hierarchy Charts. In the *Position Management* section of the *HR* tab of security profiles, the *Position Hierarchy Chart* setting has a drop-down containing the options of *All Company Positions* and *Starting From Employee (Direct)*.

- **All Company Positions** – This setting will allow all users with access to the Position Hierarchy Chart to view all the positions.
- **Starting From Employee (Direct)** – This setting will allow the user to view their own position, view the position one level above their own, and view those subordinates assigned to them.

The Position Hierarchy Chart is located under *My Info > My Company > Position Hierarchy > Position Hierarchy Chart*.



Recruitment

The following enhancements for the Recruitment module have been added.

Applicant Portal Message Text Updated

95284: Within the Recruitment Module's Applicant Portal, the message text in the Education and Work Experience tabs has been updated to help users better navigate and understand what is needed on those tabs. The new messages are:

- **Work Experience** tab: "*Start with your current/most recent employer and click Add Another Company to include more work history*."
- **Education** tab: "*Start with your current/most recent school attended and click Add Another School to include more education history*."

Job Requisitions in New UI

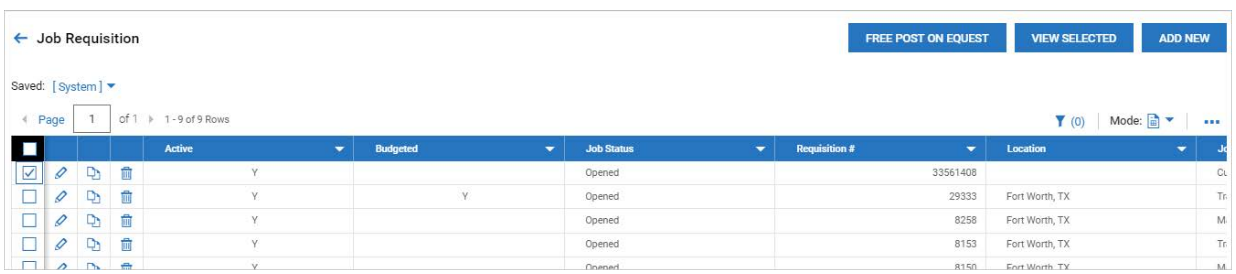
Job Requisitions Functionality Added to New UI

89646: Within the New UI, the *Job Requisition* report page will now contain the ability to view, copy, delete, and add job requisitions, as well as viewing any workflows. This is available in both the desktop and mobile versions of the New UI.

The *Job Requisition* page is accessed under *Team > Recruitment > Job Requisitions*.

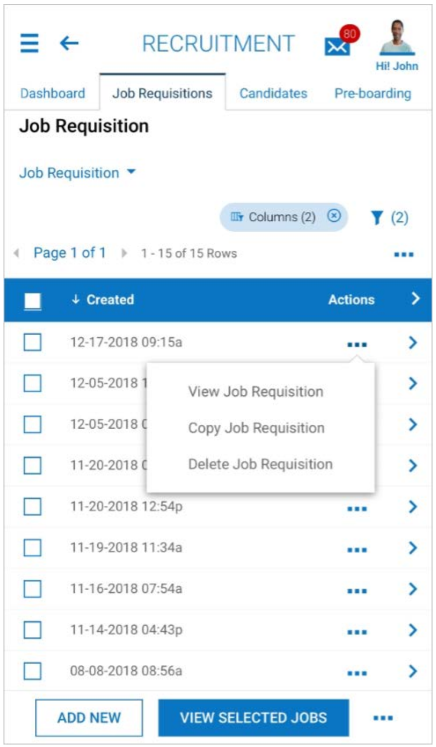
Desktop

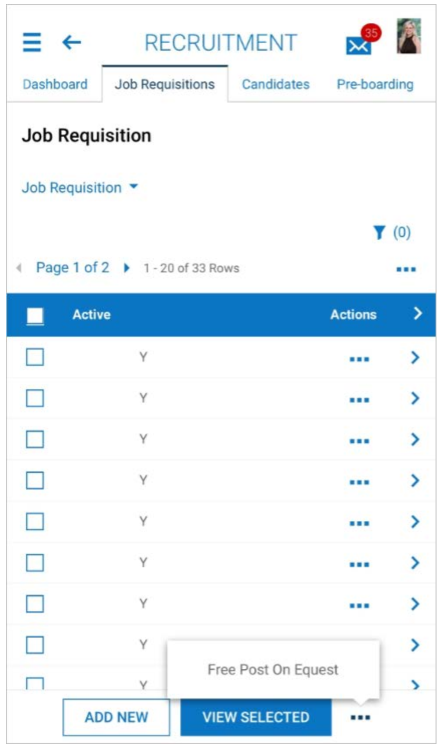
In the desktop version, icons and buttons will be used to access the options to view/edit, copy and delete. In the New UI Desktop experience, you can additionally post the job to the free eQuest Advantage Network.



Mobile

The triple dot icon next to the *View Selected Jobs* button contains an option to post the job requisition to *E-Quest* (if eQuest is enabled in company.)



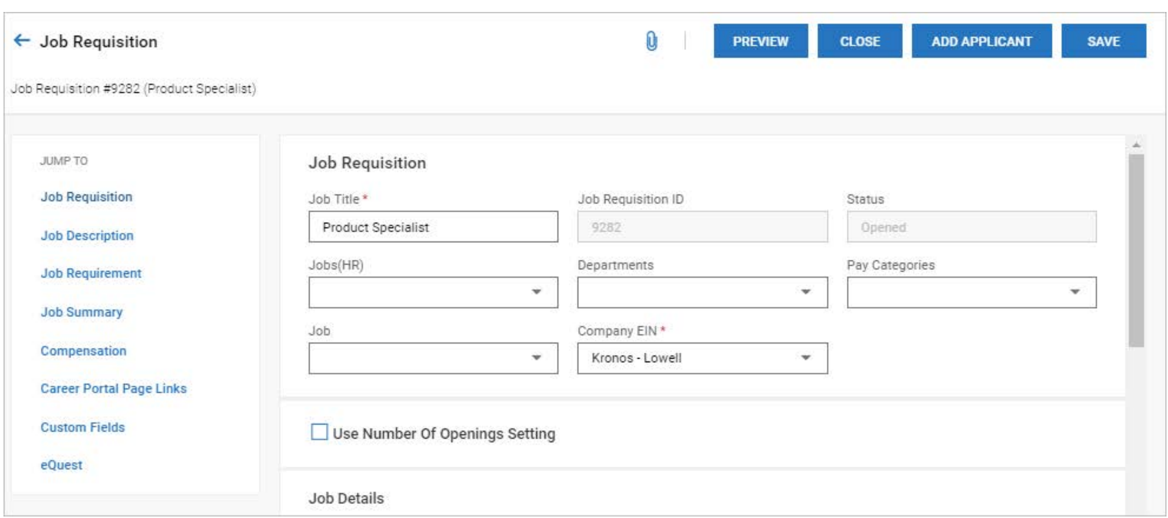


Job Requisitions Configuration Page

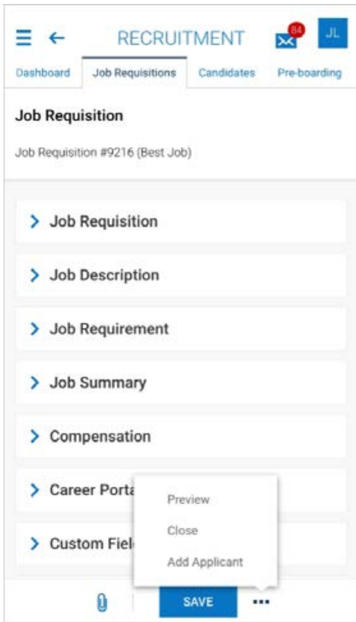
When adding or viewing a job requisition, the page will consist of configuration widgets. You can scroll through the page or use the *Jump To* links on the left to navigate to specific sections. Additionally, applicants can be added through this page in both the desktop and mobile versions and supporting documents can be uploaded.

Desktop

The configuration page has been redesigned to include *Jump To* links and widgets. A *Preview* button is available, documents can be uploaded to the job requisition, and applicants can be added.



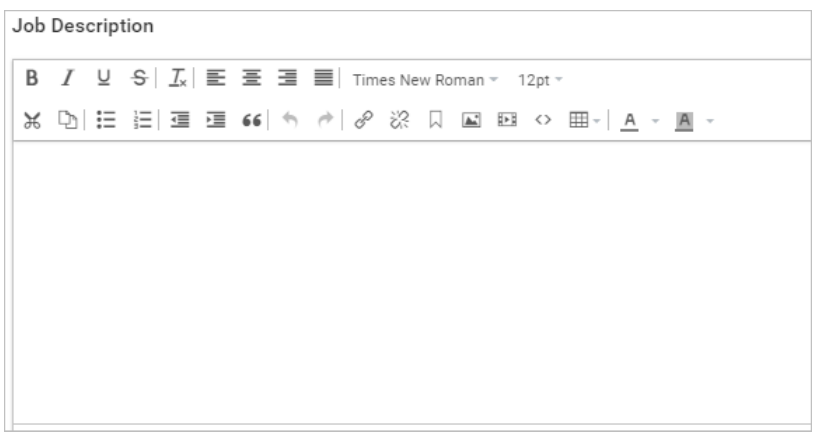
Mobile



HTML Editor

35839: Within the widgets of the Job Requisition configuration page, HTML editors are now available for entering and formatting text, or inserting tables, images, media, source code and controlling text and background color. These editors are available in the *Job Description*, *Job Requirement*, *Job Summary* widgets.

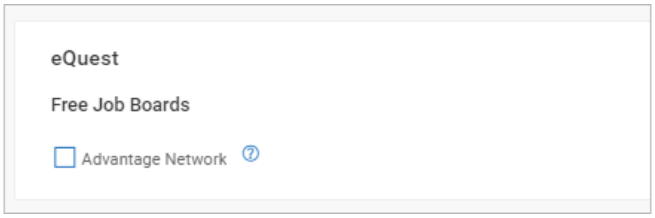
NOTE: The current editor does not include the ability to insert job board conversion trackers. This will be included in a future release.



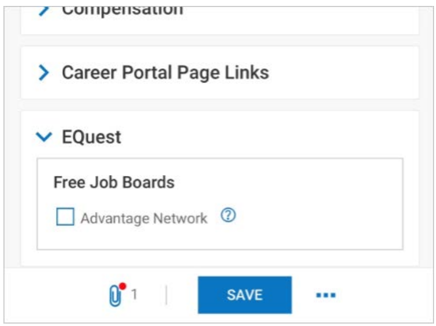
eQuest Widget

Within the job requisition, a new eQuest widget is available where you can set up how the job will be posted to eQuest. Options include the *Free Job Boards (Advantage Network)*. There are plans to add the *Premium Job Boards* in future releases.

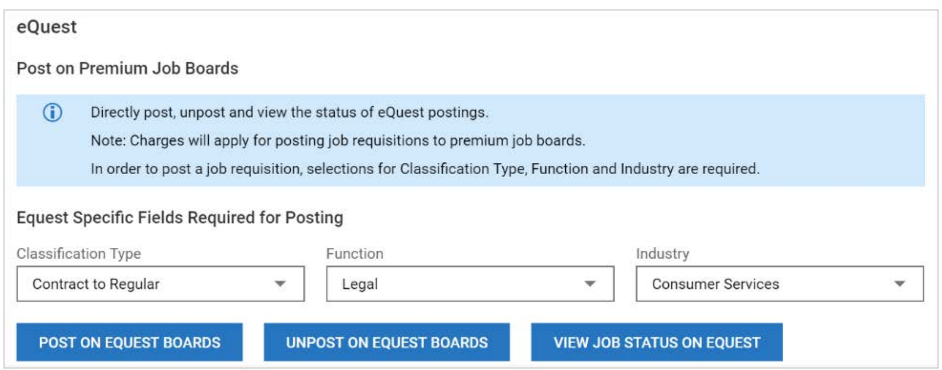
Desktop

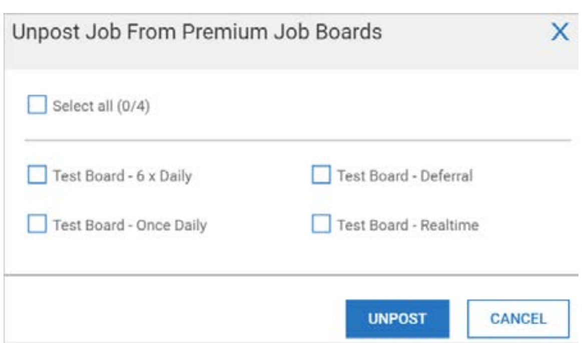


Mobile



If the eQuest Premium Job Board Marketplace product has been enabled, users will also be able to post jobs to this board.



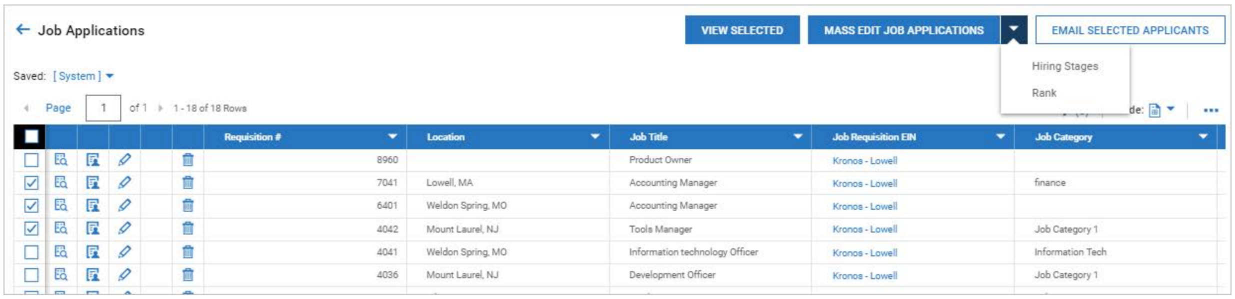


Job Applications in New UI

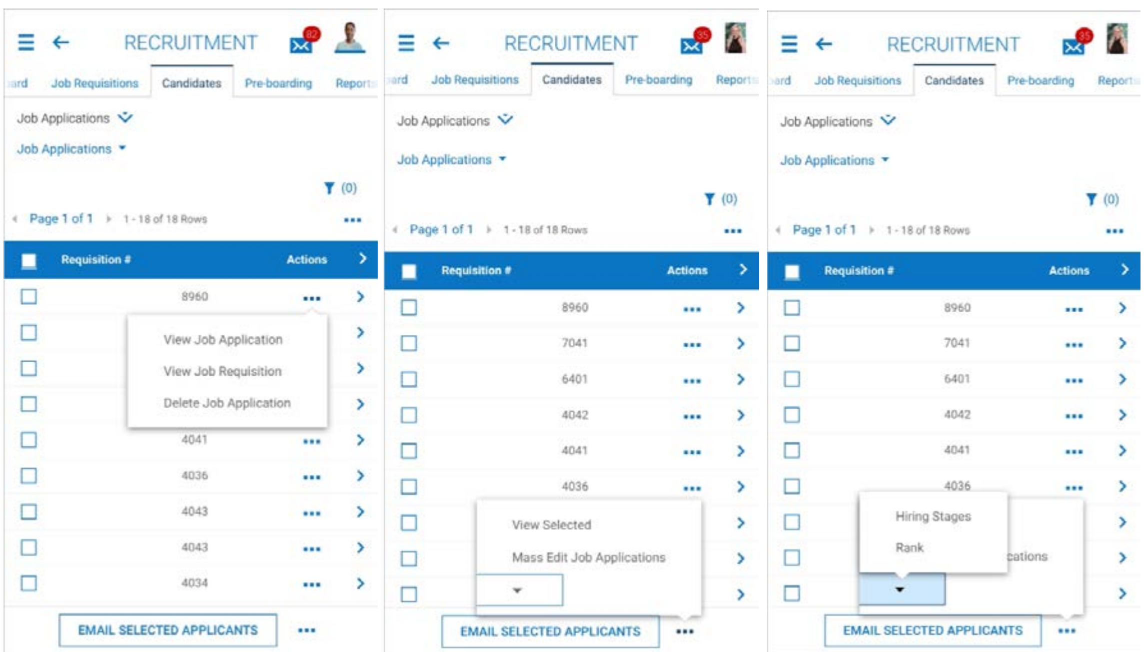
90256: Within the New UI, the Job Applications page will now support the viewing and editing of job applications, viewing and editing of job applicants, viewing and editing of job requisitions, deleting of job applications, and viewing of workflows. Options are also available to mass edit job applications and emailing selected applicants.

The *Job Applications* page is located under: *Team > Recruitment > Candidates > Job Applications.*

Desktop



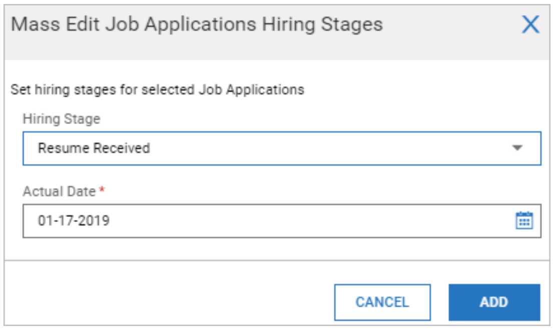
Mobile

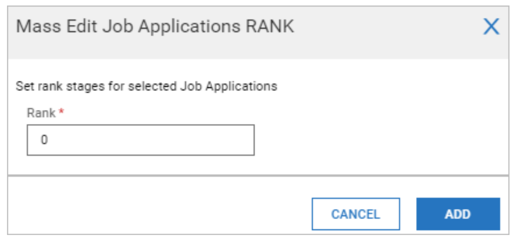


Editing Job Applications

Editing of a single job application entry will route users to the Job Requisition configuration page.

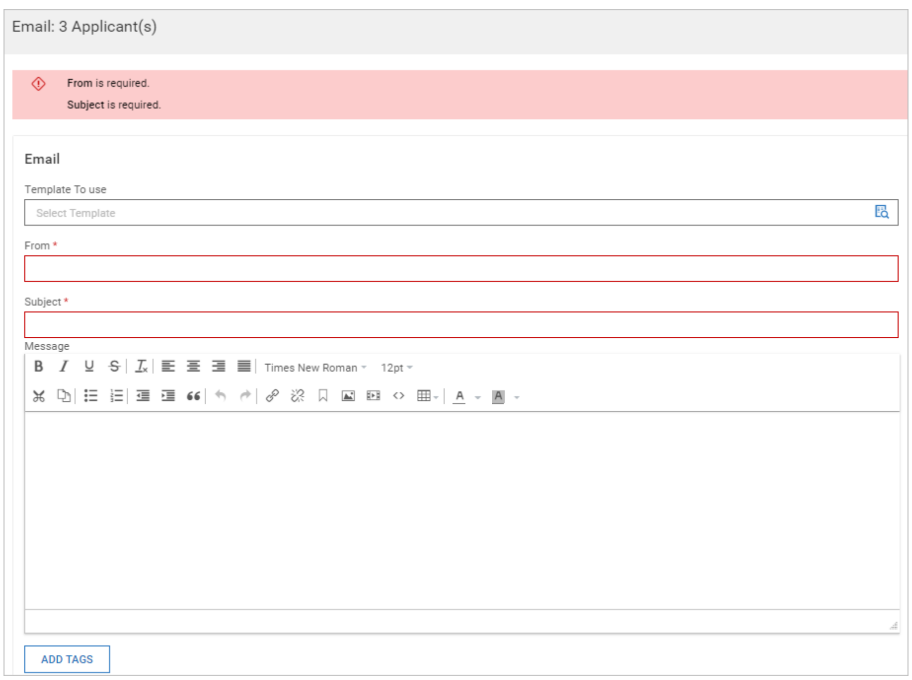
Mass editing of a job application will require the selection of multiple applications, and then selecting from the drop-down next to the *Mass Edit Job Applications* button. Options currently consist of *Hiring Stages* and *Rank*.





Email Editor

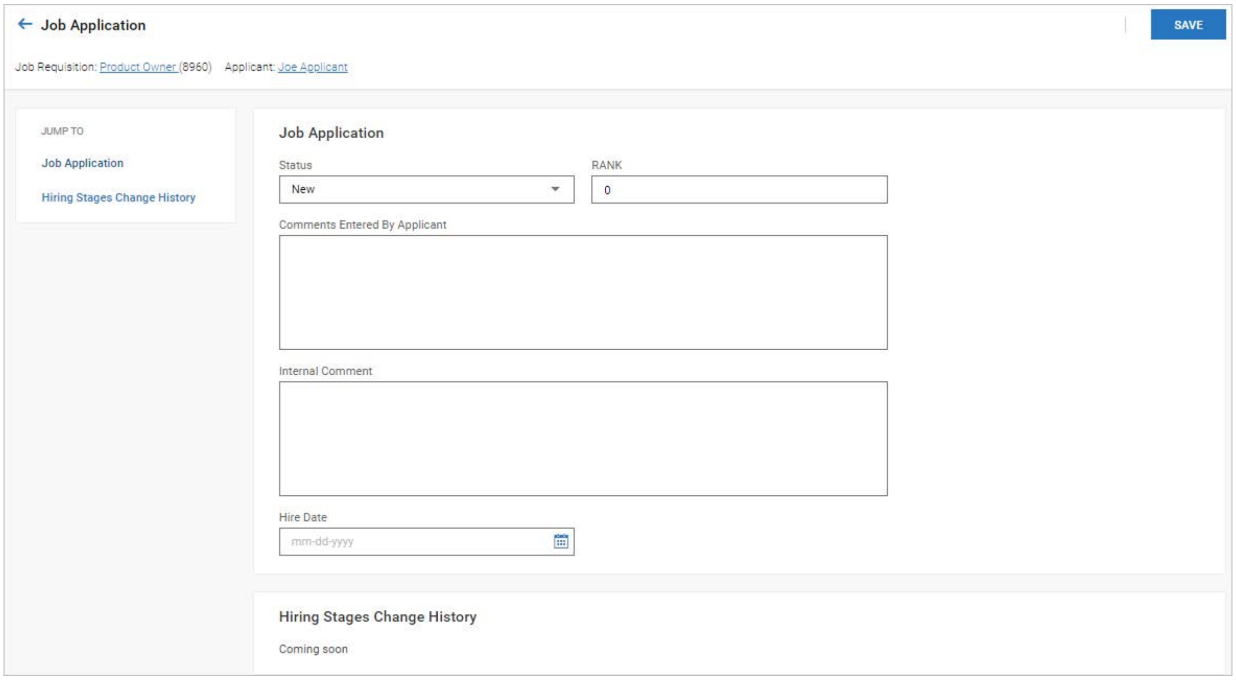
One or more applicants can be selected, and an email can be sent with or without an email template. If not using a template, the email can be manually created. An HTML Editor is available to type and format a message. System tags, such as current date/time can be added to the message which will automatically pull data from the system and include it in the body of the message. Supporting documents can be added to the emails.



Job Application Page

The configuration page has been redesigned to include *Jump To* links and widgets. The page has some features that are coming soon in future releases. A “breadcrumb” hyperlink is available for *Job*

Requisition and *Applicant*. Clicking the links will take you to the associated Job Requisition page, or to the Applicant Information Edit page.



Applicants in New UI

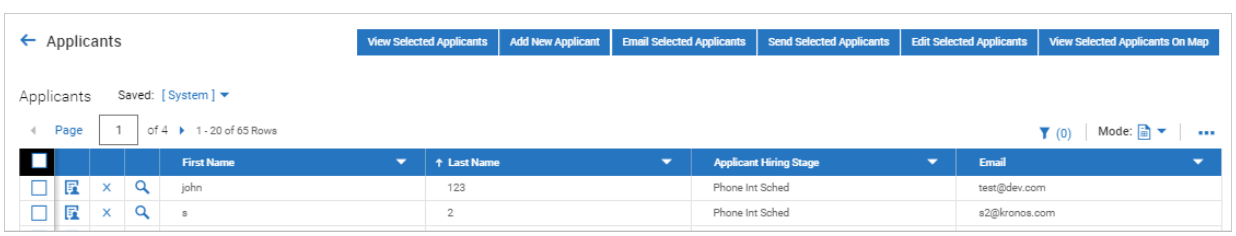
Functionality Added to Applicants in New UI

90258: Within the New UI, functionality has been added to view and delete applicants, and view text resumes. New applicants can be added, and additional options are available to email applicants, send emails, edit applicants, view applicants and view applicants on map.

Currently, this functionality is only available in the desktop experience of the New UI.

The *Applicants* page is accessed under *Team > Recruitment > Candidates > Applicants*.

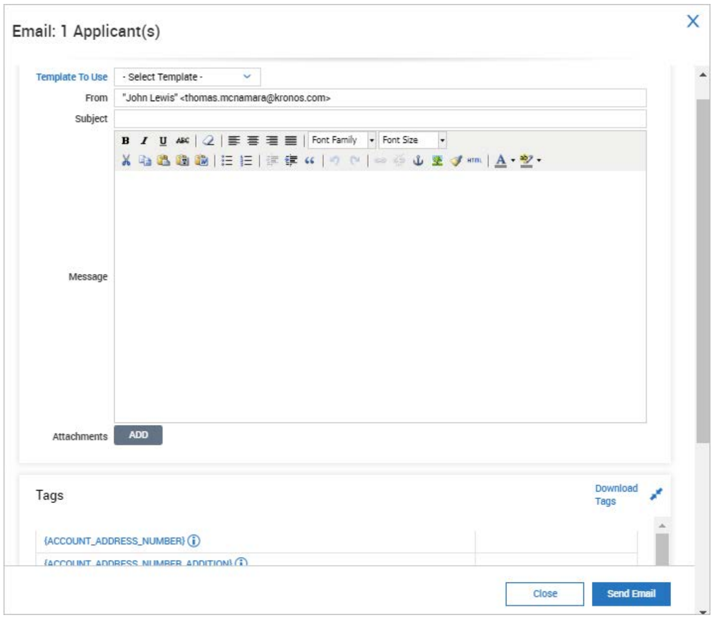
Desktop



Emailing Applicants

One or more applicants can be selected, and an email can be sent with or without an email template, using the *Email Selected Applicants* option. The *Send Selected Applicants* option will also send emails, but without a template option; these emails must be manually created. If not using a template, the email can be manually created. A template can be quickly created by clicking the *Template To Use* hyperlink label, and the user will be taken to the *Applicant Email Templates* page where a new template can be created and then selected for the email.

An HTML Editor is available to type and format a message. System tags, such as current date/time can be added to the message which will automatically pull data from the system and include it in the body of the message. Supporting documents can be added to the emails.



Applicant Interviews in New UI

New Columns Added to the All Applicant Interviews Report Page in New UI

99737, 97739, 90266: For managers, new columns have been added to the *All Applicant Interviews* report page and can be added to the report.

The *Applicant Interviews* page is accessed under *Team > Recruitment > Candidates > Applicant Interviews*.

The following columns have been added:

- **Entrance Job** – Can be added to report
- **Interview Participants** – Added as *Participants* column to default columns in report
- **View Applicant** – Default button in report, accessed via button/icon

Reports

The following enhancements have been completed for reports functionality.

Job Info History Report Column Updates

93534: Previously, the *Field*, *Old Value* and *New Value* columns of the *Job Info History* report page populated with system ID values, rather than meaningful data. In this release, those columns have been updated to display actual values, rather than system IDs.

In addition, new columns are available to be added to the report that will display the system ID information. We have added the following columns: ***Field Id***, ***Old Id***, and ***New Id***.

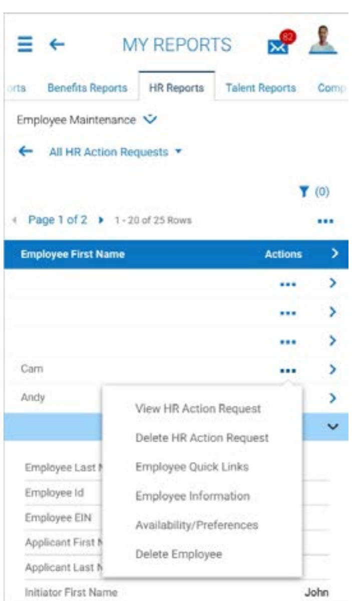
This report page is located under *Company Settings > HR Setup > Jobs*. To view the *Job Info History* page, click the *Edit* icon for one of the jobs, and then select the *Job Info History* button.

Updated Columns			New Columns		
FIELD	OLD VALUE	NEW VALUE	FIELD ID	OLD ID	NEW ID
External Id		23596752	External Id		23596752
Payroll Code		P1252	Payroll Code		P1252
Pay Grade		Level 15	HR_PAY_GRADE_ID		25729
Worker Type		Employee	WORKER_TYPE_ID		1015808
Security		Manager	SECURITY_PROFILE_ID		646352

Delete Option Added to All HR Action Requests Report Page in New UI

96878: Within the New UI, the delete option has been added to the All HR Action Requests report, located under *My Info > My Reports > HR Reports > Employee Maintenance > All HR Action Requests*. This is now available for the New UI Mobile experience and was previously available in the New UI Desktop experience.

Mobile Example



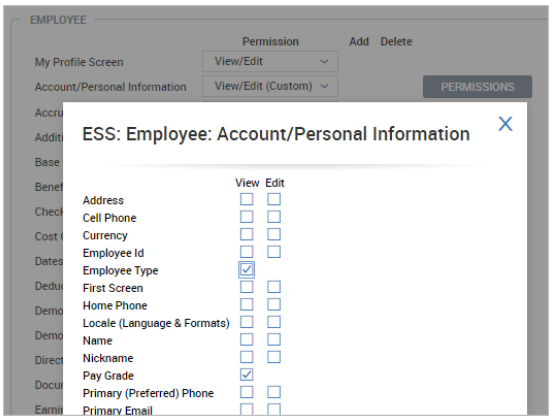
Security: Employee Data in Pay Info Widget Available for Employees

1560: Pay Grade and Employee Type data from the Pay Information widget of employee accounts can now be made available to employees so they can view their information in read-only access in the Pay Information widget of their profile within the New UI. These fields will also be made visible as read-only fields on custom forms.

Pay Information Widget / Pay Grade Section

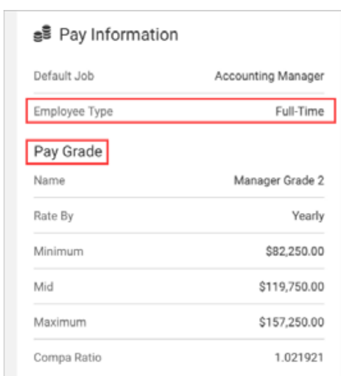
- Employee Type
- Pay Grade

The ability for employees to view this information will be set in their assigned security profiles under the *ESS* tab. The following security settings have been added to the *Account/Personal Information* setting in the *Employee* section of the *ESS* tab. The setting must be set to *View/Edit (Custom)*, and the *Permissions* button selected.



- **Employee Type** – This setting allows employees to view their employee type in the *Pay Information* widget of their profile within the New UI. If this field is also used in custom forms, employees can view the information there as well.
- **Pay Grade** – This setting allows employees to view their pay grade level in the *Pay Information* widget of their profile within the New UI. If this field is also used in custom forms, employees can view the information there as well.

New UI Mobile Example – Pay Information Widget in Employee Profile



Workflows

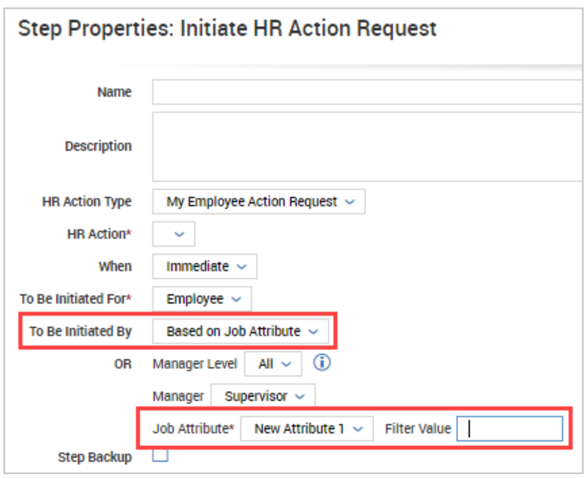
The following enhancements have been completed for workflows functionality.

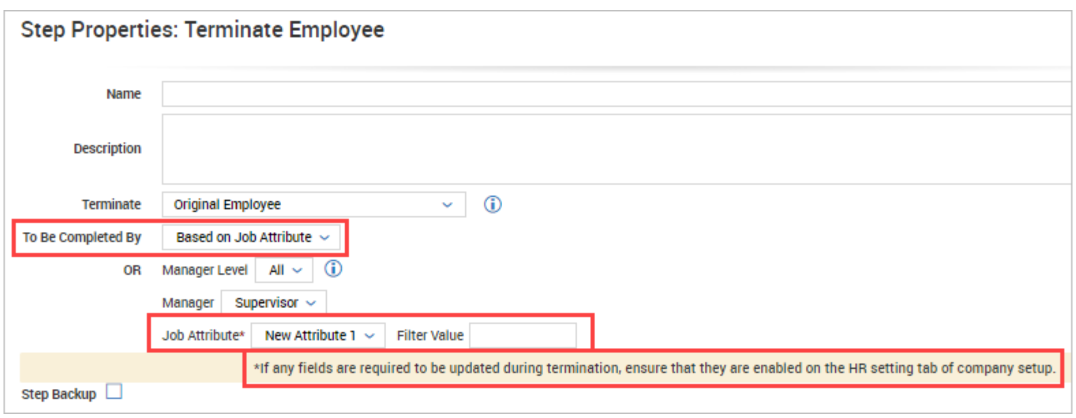
Job Attributes Added to HR Action and Terminate Steps

90839: In the October 2018 system release, we added the ability to complete the *Approve/Reject* steps of HR workflows using Job Attributes as set in HR Jobs. We have now added this functionality to the *Initiate HR Action Request* and *Terminate Employee* steps.

By choosing this option, the system will hunt through the hierarchy, starting from the highest level. If that person is unauthorized, the system will route to the next person in the hierarchy and check their credentials, and so on until an authorized user is found.

NOTE: Job Attributes must be defined in the *Job Attributes* section of Jobs, located under *Company Settings > HR Setup > Jobs*.





This option will be available in the *Initiate HR Action Request* and *Terminate Employee* steps of the following workflow types:

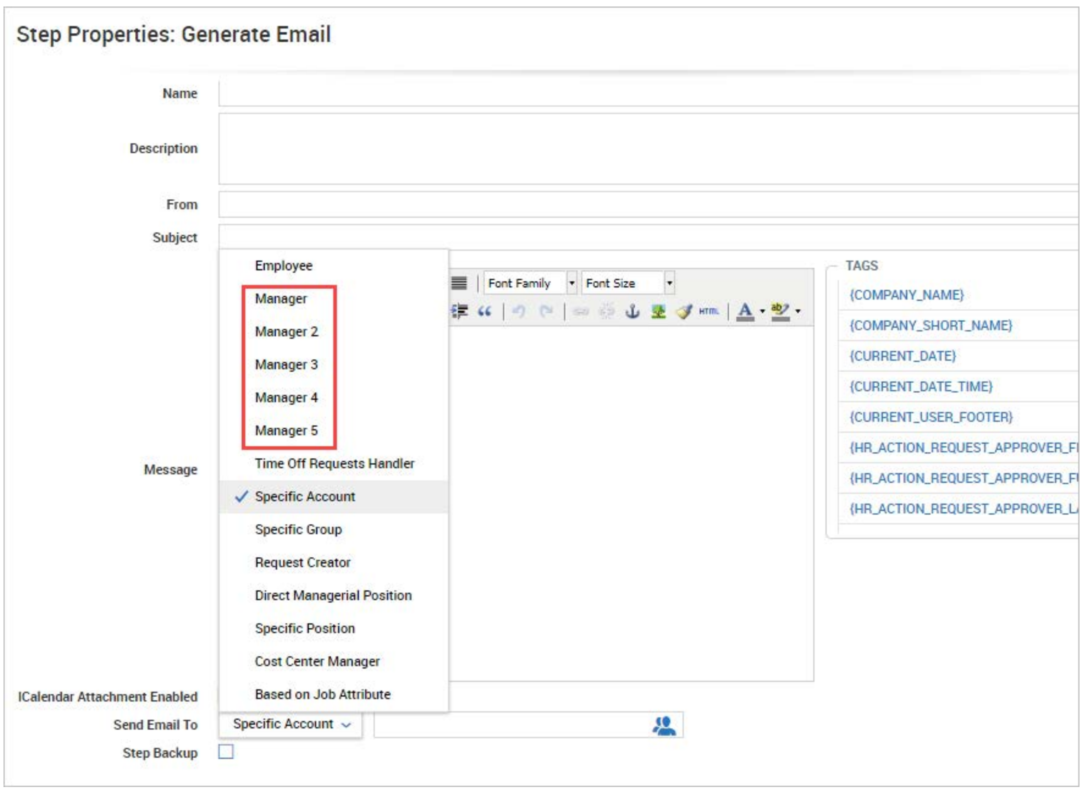
- HR Action Request
- Job Requisition
- Compensation Proposal Request
- Checklist Item Request
- Performance Review Request

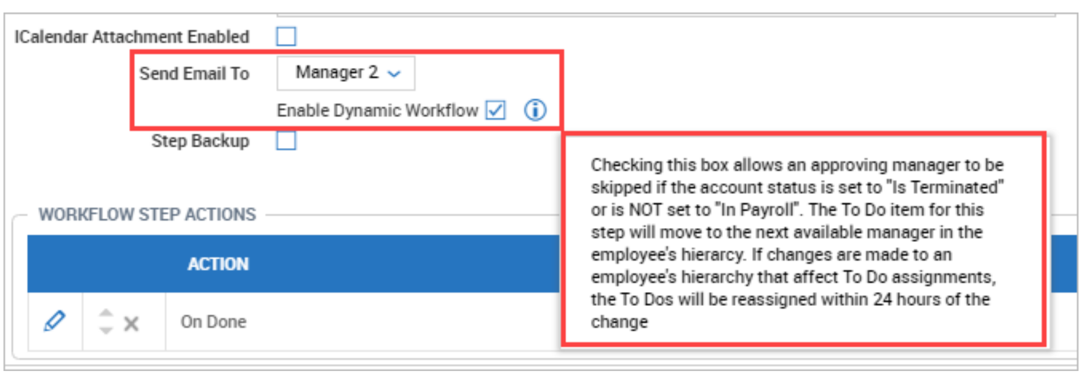
- Benefit Plan Change Request
- Incident Types
- Questionnaire

Manager Levels Added to Generate Email Step

90850: Within the *Generate Email* step of HR workflows, manager levels have been added as recipient options in the *Send Email To* drop-down field. When one of the manager options is selected, an *Enable Dynamic Workflow* option is presented. This option will ensure the workflow will continue to be routed through the employee management hierarchy, should a manager no longer be active in the company.

Additionally, if changes are made to an employee's management hierarchy after the resulting To Do Item has been generated, the system will reassign the To Do Item to the next person in the hierarchy within 24 hours.

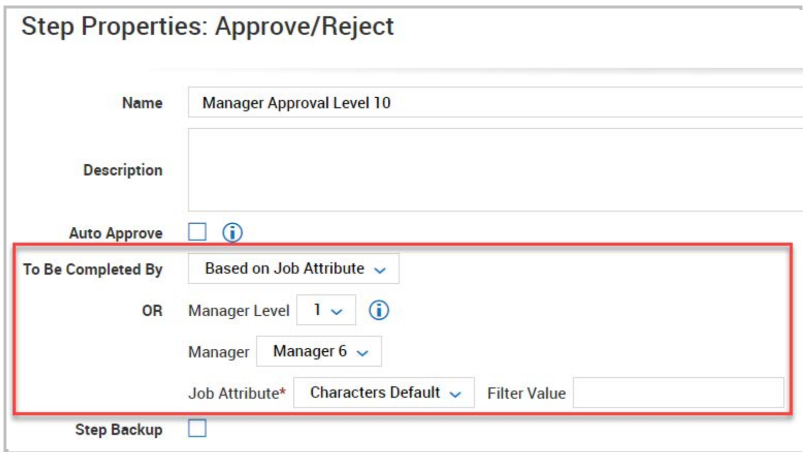


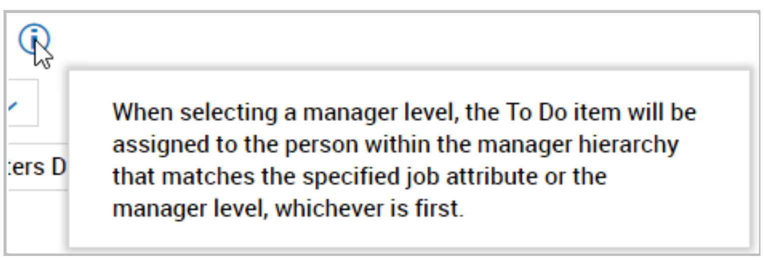


Manager Level Field in To Be Completed By: Based On Job Attribute Setting

94616: The *To Be Completed By: Based on Job Attribute* setting within a workflow step now includes a *Manager Level* field. Users can utilize this field to configure a workflow step so that To Dos will be assigned up the manager hierarchy (either sequentially or in parallel) until either a person in the hierarchy with the Job Attribute designated is reached, or the highest Manager Level indicated in the workflow is reached, whichever comes first.

One (1) To Do is generated for each Approve/Reject step in the workflow. If only one Approve/Reject step is configured, only one person will get the To Do; either the person with the Job Attribute or the specified highest Manager Level.





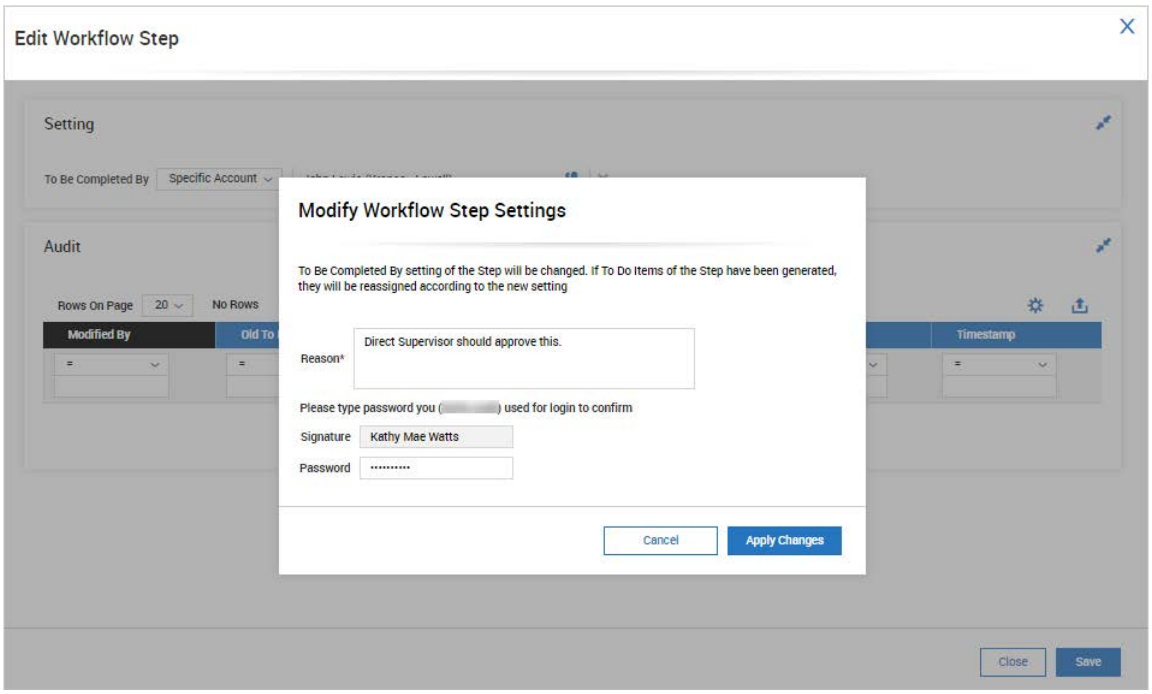
Users can select a Manager Level of *All* or any value from *1-10*. This new option has been applied to the following workflows:

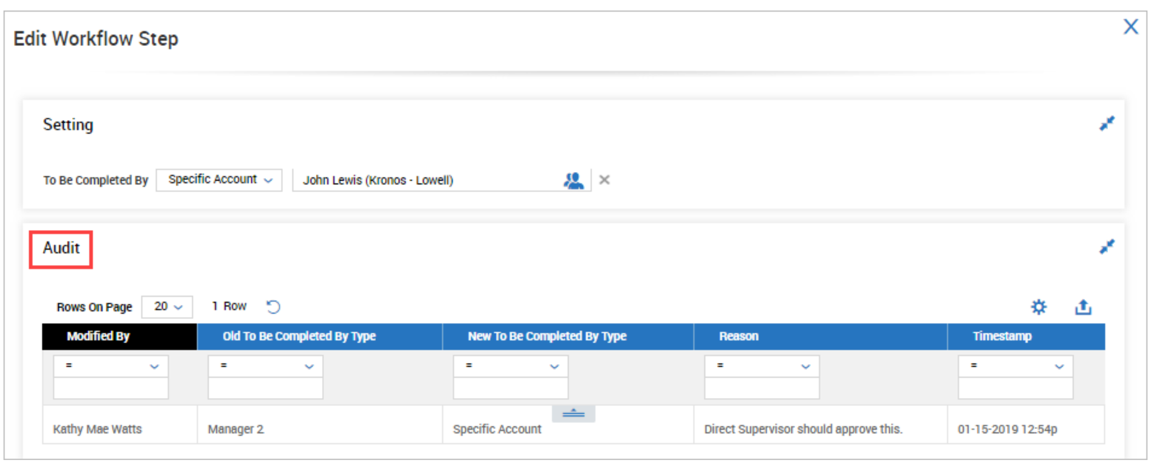
- HR Action Request
- Job Requisition
- Compensation Proposal Request
- Checklist Item Request
- Performance Review Request
- Benefit Plan Change Request
- Incident Types
- Questionnaire

Editing of Approve/Reject Workflow Step During Workflow Process

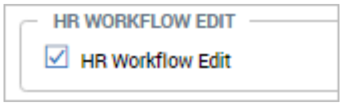
6326: When users receive a To Do Item to approve or reject an HR Action Item, they can now click the workflow icon/link in the To Do Item and edit the Approve/Reject step(s) within the workflow to route to other approvers. Once edited, the system will remove the To Do Item from the user's list and route to the new approver.

When editing the workflow, users will be prompted to enter a reason and then confirm the edit with their password. Once clicking Save, the system will process the edit and generate an audit record of the transaction.





A new security setting will control whether users can perform this edit. The ***HR Workflow Edit*** setting, located in a new *HR Workflow Edit* section of the *HR* tab, must be checked to give users editing rights.



NOTE: Currently, this is only available for HR Action workflows. There are future plans to add this capability to other workflows.

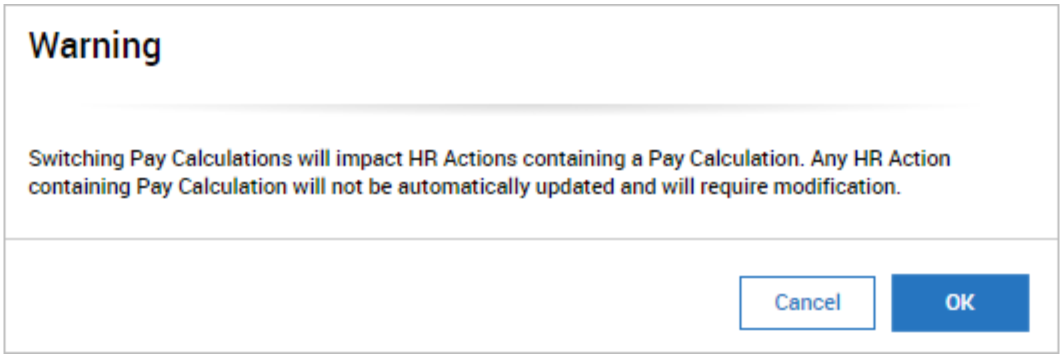
Admin Enhancements

The following administrative enhancements have been added to this release.

HR Actions: Warning Added When Changing Pay Calculations Engine

101441: A new warning message has been added and will display when switching the Pay Calculation engine in the *Available Functionality* widget of the *Edit Company* screen. The message will warn users that switching will impact any HR Actions containing the Pay Calculation action item; requiring manual modification of those actions.

This message will display whether switching from/to the original Pay Calculations or Pay Calculations 2.0.

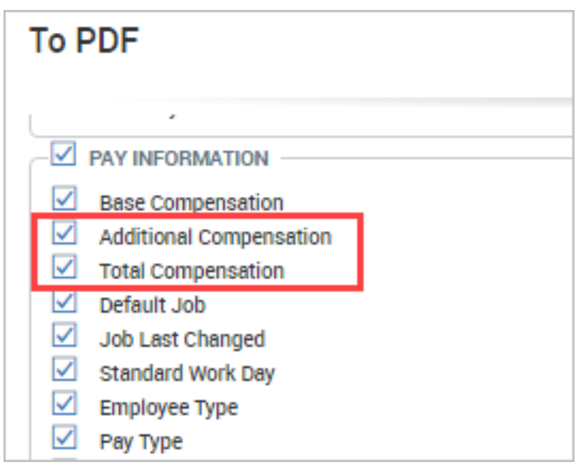


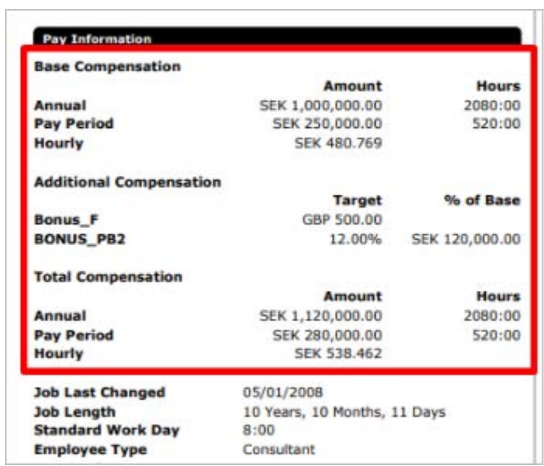
Employee Information

Additional & Total Compensation Added to PDF (Classic UI & New UI Desktop)

98391: Within employee accounts, when using the *Download PDF* option, the new *Additional Compensation* and *Total Compensation* data is now available to be selected for inclusion in the PDF.

This is available in the Classic UI and in the New UI Desktop. It is not yet available in New UI Mobile.





HR Actions

HR Actions: Multi EIN Transfer Action History is Read-Only (Classic UI & New UI)

102875, 102866, 89875: Because historical data should be preserved in its original state, we will now keep the historical data of Checklist History, Job Change History, and Incidents as read-only in the target EIN when using the *Multi EIN Transfer* action item for HR Actions.

HR Actions: Confirmation Message Added to Termination HR Action (Classic UI & New UI)

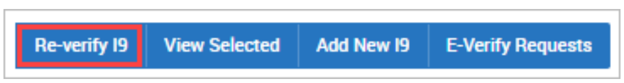
87615: When managers or administrators approve the termination of an employee via the Termination HR Action, a confirmation pop-up will now display to allow the user to stop or proceed with the action.

HR I9 Forms

Re-Verify Option Added to I9 Forms (Classic UI)

5909: A new ***Re-Verify I9*** option has been added to employee I9 forms. The option will only work for I9 forms that have previously been verified. Reverification is a compliance requirement in certain cases.

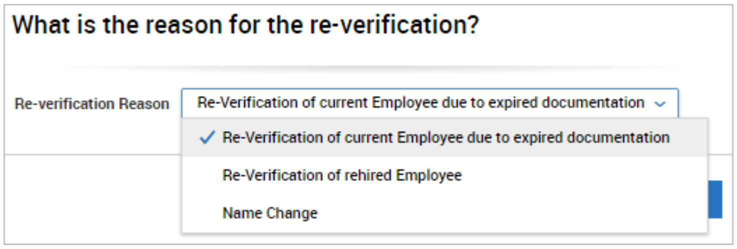
- **Classic UI**: *My Employees > Forms > I9s*
- **New UI**: Coming in a future release



- Older forms cannot be re-verified. An error message will display explaining the form is expired.
  - Current forms eligible for re-verification are set to expire on 8/31/2019.
  - Older forms not eligible for re-verification expired earlier than 7/17/17.
- When clicking the button, the system will perform a check on the employee's citizen status. Re-verification is never required for U.S. citizens and non-citizen nationals. If selecting an employee who does not qualify for re-verification, a message will display.

To use the option, select an employee and click the *Re-Verify I9* button. If the employee is eligible, a re-verification reason will then be presented. After selecting the reason, a page will display containing the form, an area to add notes, supporting documents, and an audit report.

The form can be edited depending on the selected reason.



- **Name Change** – Opens only the name fields in Section 3 and signature fields for editing.
- **Expired Documents** – Opens only the document fields and signature fields for editing.
- **Rehire** – System will look for termination date. If later than 3 years, a whole new form will be required and no Re-Verify button will be available. If less than 3 years ago, the *Date of Rehire* field and signature fields will open for editing and a Re-Verify button will be available.

HR Incidents

Columns Added to HR Incidents Report Page (Classic UI & New UI)

60187 & 1873: Resolution information is now available to be added to the Incidents report. The following columns can be added:

- *Resolution Target Date*
- *Resolved Date*
- *Resolution Type*
- *Resolution Details*

Additionally, the information from these columns will now display on the PDF of this report. The Incidents report is available in the following locations:

- Classic UI: *My Employees > Employee HR Maintenance > Incidents*
- New UI: *Team > HR > HR Maintenance > Incidents*

HR Termination Details

Transferred Historical Data Using Multi EIN Transfer (Classic UI & New UI)

102857: When employees are terminated in one EIN and transferred to another EIN using the Multi EIN Transfer HR Action, the resulting historical termination data in the new EIN will be read-only. This will include the Termination Details report and the Termination Details widget in employee accounts.

This will be applicable to the Classic UI and the New UI, both desktop and mobile.

HR Turnover Rates

Multi EIN Filter Added to HR Turnover Rates Report (Classic UI & New UI)

7911: For Multi EIN companies, an option to select an EIN is now available in the Turnover Rates report.

- Classic: *My Reports > HR > Turnover > Turnover Rates*
  - *Company EIN* drop-down, available in report header
- Desktop: *Team > HR > Reports > Turnover > Turnover Rates > Turnover Rates Summary*
  - *Company EIN* drop-down, available in the *Filters* pop-up
- Mobile: *Team > HR > Reports > Turnover >Turnover Rates*
  - *Company EIN* drop-down, available in the *Filters* pop-up

Mass Edit: Switch Primary EIN (Classic UI)

98745: For Multi EIN companies, an option to mass update employee Primary EINs is now available. This will allow HR and Payroll administrators to change the employee primary EIN assignments if those employees exist in more than one EIN. Previously, this had to be done manually, one account record at a time.

To use this feature, the employees must have an account in each EIN. Navigate to *My Employees > Employee Maintenance > Mass Edit.*

- Click the *Switch Primary EIN* button.
- Select the affected employees, click the *Switch Primary EIN* button again.
- Select the new EIN and click OK to update.

NOTE: This not yet available in the New UI.

New EasyBackgrounds Marketplace (Classic UI & New UI)

101108: After the new version of EasyBackgrounds has been installed, employees can view historical background checks ordered on them via the old version.

Classic UI

- *My Account > My Background Checks > My Background Checks History*

New UI

- *My Info > My HR > Background Check > Background Checks History*

Position Management

Imports – Position Assignment Import by External ID (Classic UI & New UI)

105841: To allow companies the option to import positions created in third-party environments and containing unique External ID numbers, we have now added an ***Employee External ID*** number to the ***Employee Position Assignments*** import template.

NOTE: If using both the Position Id and the External Id in the template, the system will only look to the Position Id when performing the import.

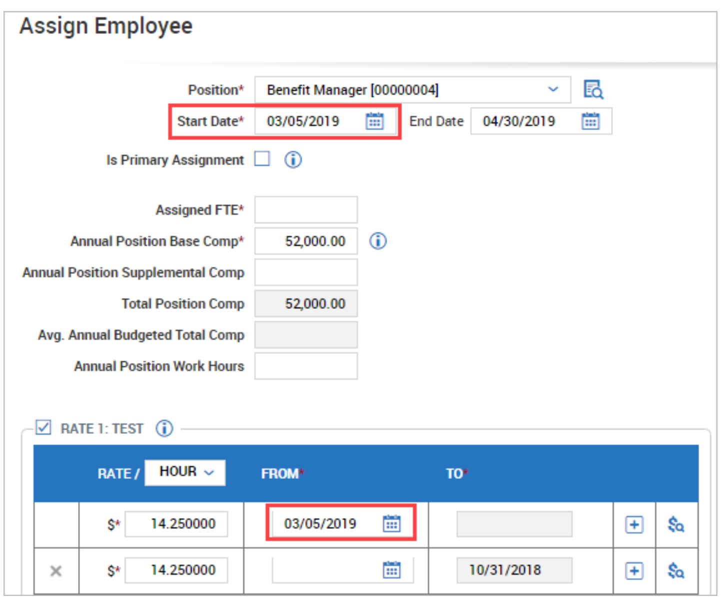
General Note: It is important that the first line of the upload file contain field names which match **exactly** to the field names specified below. Only REQUIRED fields need to be passed in on every load. Column order is not important.

Field Name	Required	Length	Valid Formats	Description
Username	Yes			At least one of UserName, EmployeeID, SSN, and Employee External Id is required If multiple fields are used on the same row the values entered must belong to the same employee or an error will generate
Employee Id	Yes			
SSN	Yes		###-##-####	
Employee External Id	Yes			
EIN Tax Id				For Multi-EIN companies. If it's impossible to identify an employee by Username, Employee Id, SSN or Employee External Id, then employee's EIN has to be specified using one of these fields. If both EIN Tax Id and Name were specified, Tax Id will be used.
EIN Name				
Position Id	Yes	8	##	At least one of Position Id and External Id is required and must match an existing Position
External Id	Yes			
Position Name	Yes			Position Name (must match the Position Id)
Start Date	Yes		mm/dd/yyyy	Start Date of Employee Assignment
End Date			mm/dd/yyyy	End Date of Employee Assignment

Position Assignment - From Date Default in Non-Primary Rate Tables (Classic UI & New UI)

99250: To avoid date validation warnings, the *From* date in the rate table for non-primary assignments will now use the *Start Date* of the assignment. The date will remain editable if another date is needed.

Note that this will occur when adding a new assignment (it will not auto-populate when editing an existing assignment.) And, it will only populate the first row/section of the rate data.



Position Assignment – Adding Rates to New Non-Primary Assignments (Classic UI & New UI)

100976: We added the ability to edit an employee assignment and add rates to non-primary position assignments. In that release, rates could only be added when editing an assignment.

We have also added the ability to add rates to non-primary assignments while adding a new assignment. As a reminder, rates are only available on assignments where *Is Primary Assignment* is not enabled, making it a non-primary assignment.

This is available for the Classic UI and New UI in both desktop and mobile.

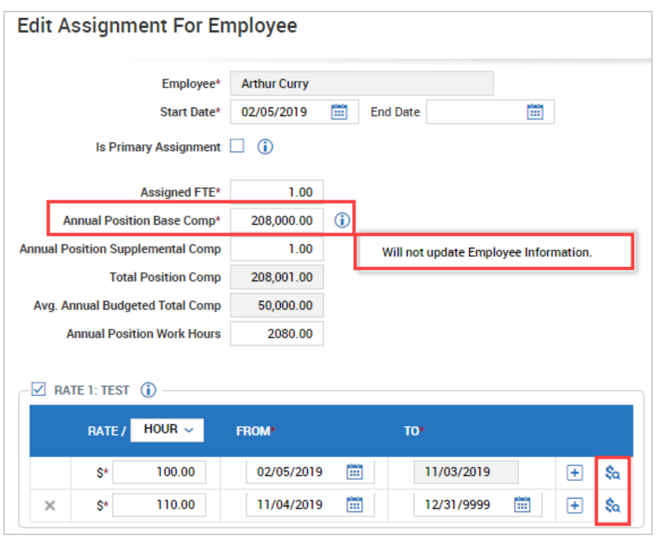
- Classic UI: My Reports > HR > Position Management > Employee Assignments
- New UI: Team > My Team > Employee Assignments

Position Assignment - Calculate Icon Added to Rate Widget (Classic UI & New UI)

99233, 88532, 104272: In the February 2019 system release, we added the ability to enter a different rate of pay for non-primary position assignments and have that information automatically create an entry in the employee's Personal Rate Table. Multiple rates for the same non-primary position assignment, along with effective dates can be added, which allows increases for that position to be scheduled.

We also perform a calculation based on the employee's base compensation and the rate being applied. This information is displayed in the *Annual Position Base Comp* field of the position assignment screen. This calculation is for informational purposes and does not update the employee's base compensation in their account.

When there is more than one rate entered in the position assignment screen, the calculation was previously calculated only from the first rate listed. With this release, we have added a calculation icon that will appear next to each rate. When clicked, the calculation in the *Annual Position Base Comp* field will update according to the rate entered.



Rates – Behavior if Position Management Disabled (Classic UI & New UI)

90748: In the event you decide to turn off Position Management, any rate entries created by the *Rate For Position* fields in position assignments will be preserved as historical data in employees' Personal Rate Tables in their accounts.

NOTE: This affects the Classic UI but is available in the New UI as Classic page.

Reports – Gender Column Added to Employee Assignments Page (Classic UI & New UI)

101618: The ***Demographics: Gender*** column is available to be added to the *Employee Assignments* report page. This is available for the Classic UI and New UI in both desktop and mobile.

- Classic UI: My Reports > HR > Position Management > Employee Assignments
- New UI: Team > My Team > Employee Assignments

Reports - Non-Primary Position Rate Assignments Info Added (Classic UI & New UI)

97668, 97669, 97665, 97261, 97671: When a different rate of pay is added to non-primary positions, that information will now be available in employee assignment reports.

Three columns are available to be added to the reports: ***Assigned Rate***, ***Rate From***, and ***Rate To***. These columns can be added to the following reports.

Classic UI

- *My Reports > HR > Position Management > Employee Assignments*
- *Company Settings > HR Setup > Positions. Click View Positions icon. In the Employees Assigned To The Position widget, the columns can be added.*
- *My Employees > Employee Information in the Assignments To Positions widget, the columns can be added.*

New UI – Mobile & Desktop

- *Team > My Team > Employee Assignments*

Recruitment

The following enhancements have been completed for the Recruitment module.

Applicant & Benefit Questionnaire PDF to Include Name and ID (Classic UI & New UI)

23669: Previously, when downloading a PDF of Employee Benefit Questionnaires or Applicant Tracking Questionnaires, both the file name and the PDF itself, did not denote who the applicant/employee was, once downloaded. We have now added name and ID information to these downloaded PDFs.

Employees

Can download their questionnaire in PDF.

- Classic UI: *My Account > My Benefits > Review/Select Benefits > Benefit Enrollment Questionnaire*

Managers

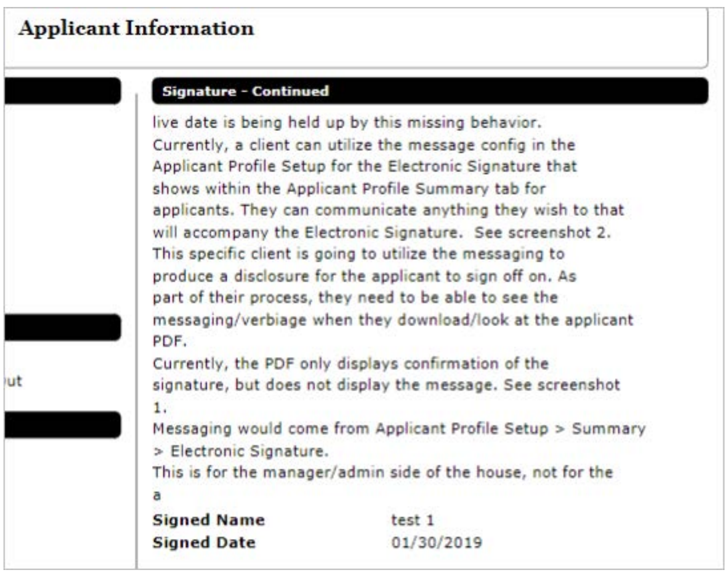
Can download applicant & employee questionnaires in PDF.

- Classic UI: *Recruitment > Job Applications* or Recruitment > Applicant Questionnaires, click the *View Applicant Questionnaire* icon, then download the questionnaire in PDF
- New UI (Desktop Only): *Team > Recruitment > Candidates > Job Applications or Team > Recruitment > Candidates > Applicant Questionnaire Answers*, click the *View Applicant Questionnaire* icon, then download the questionnaire in PDF.

Electronic Signature Displayed on Applicant PDF (Classic UI & New UI)

77928: When downloading and viewing an applicant PDF, managers and administrators will now be able to see the message that an applicant views when they electronically sign off on their applicant profile. Previously, the PDF displayed confirmation of the electronic signature only, but not the accompanying message.

Electronic signatures are configured in the *My Summary* section of the *Applicant Profile Setup*. This information, along with the applicant's confirmation will display on the PDF.



Reports

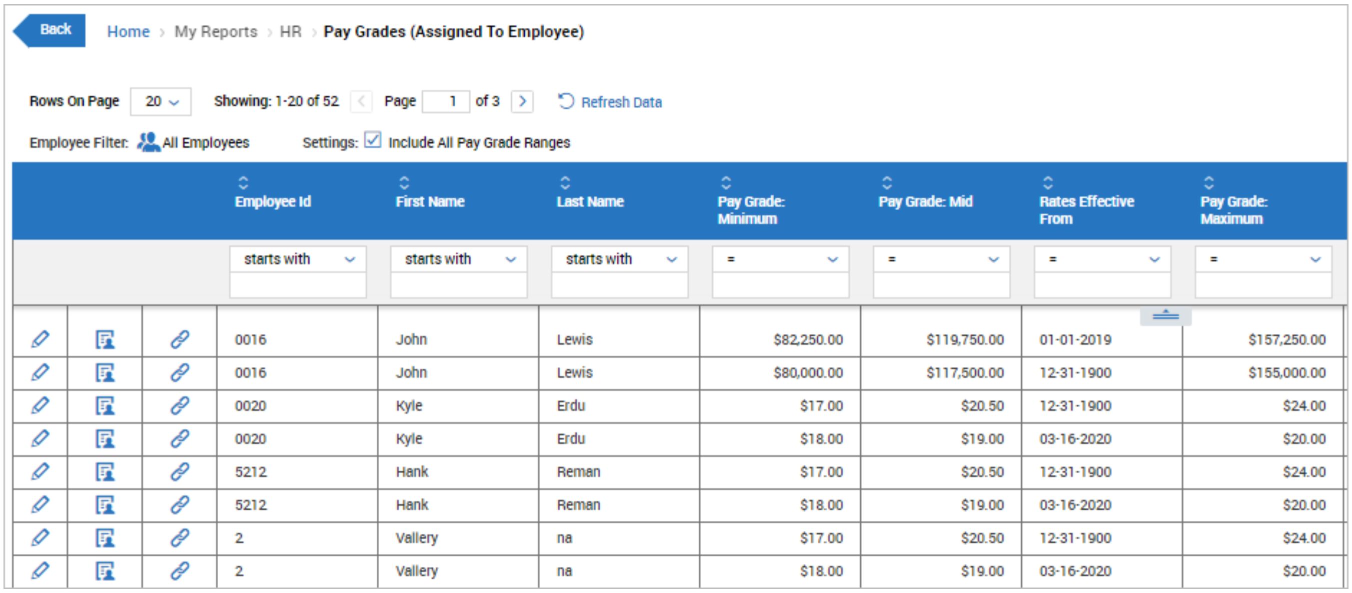
Effective Date Added to Pay Grades (Assigned To Employee) Report (Classic UI & New UI)

98824: A ***Rates Effective From*** column has been added to the *Effective Pay Grades* widget of the *Pay Grades (Assigned To Employee)* report, along with a new ***Include All Pay Grade Ranges*** setting.

The column will display current employee Min/Max/Mid pay grades.

The setting will allow past and future-dated changes to be displayed.

Classic UI: *My Reports > HR > Pay Grades (Assigned To Employee)*



New UI: *Team > HR > Reports > HR Maintenance > Pay Grades (Assigned To Employee)*

New UI Enhancements

The following enhancements affect only the New UI. Unless stated otherwise, the enhancements will affect both the Mobile and Desktop versions.

HR Actions: Table of Supported HR Actions Items as of this Release (New UI)

The list below is a cumulative list over the last five system releases, including this one. All HR Action Items listed in this table are supported in both the New UI Mobile Experience and the New UI Desktop Experience.

<u>In this release – April 2019</u>

- **Benefit Plans**

**** New HR Action Items added for this release (April 2019) are marked with a double asterisk.**

HR Action Item	Type My Employee	Sub-Type Hire	Sub-Type Term.	Sub-Type Re-Hire	Sub-Type Regular	Type My Info	Widget Updated
Address	X	X	X	X	X	X	Personal Information
Base Compensation	X	X	X	X	X		Base Compensation
Cost Centers	X	X	X	X	X		Cost Centers
Cell Phone	X	X	X	X	X	X	Personal Information
Home Phone	X	X	X	X	X	X	Personal Information
Manager 1-6	X	X	X	X	X		Managers
Default Job	X	X	X	X	X		Pay Information
Primary Email	X	X	X	X	X	X	Personal Information
Account Status	X		X	X	X		Personal Information
Hire Date	X	X					Dates
Re-Hire Date	X			X			Dates
*Hire	X	X					See Below
Started Date	X	X					Dates
Account Contacts	X	X	X	X	X	X	Account Contacts
Birthday	X	X	X	X	X	X	Dates
Actual Marital Status	X	X	X	X	X	X	Account Demographics
*Social Security #	X	X	X	X	X	X	Personal Information
Work Phone	X	X	X	X	X	X	Personal Information
Social Insurance #	X	X	X	X	X	X	Personal Information
National Insurance #	X	X	X	X	X	X	Personal Information
Terminated Date	X		X				Dates
Disability	X	X	X	X	X	X	Account Demographics
Re-Hired	X			X			Re-hired
Employee ID	X	X	X	X	X		Personal Information
Corporate Officer	X	X	X	X	X	X	Account Demographics
Add Base Compensation	X	X	X	X	X		Compensation History
Standard Work Day	X	X	X	X	X		Pay Information
Benefit Profile	X	X	X	X	X		Profiles
*Direct Deposit (ESS and MSS)	X	X	X	X	X	X	Direct Deposits
Employee Type	X	X	X	X	X		Pay Information
Ethnicity		X	X	X	X	X	Account Demographics
Holiday Table Profile	X	X	X	X	X		Profiles
Security Profile	X	X	X	X	X		Profiles
Timesheet Profile	X	X	X	X	X		Profiles
Gender	X	X	X	X	X	X	Account Demographics
Pay Prep Profile	X	X	X	X	X		Profiles
Pay Period Profile	X	X	X	X	X		Profiles

HR Action Item	Type My Employee	Sub-Type Hire	Sub-Type Term.	Sub-Type Re-Hire	Sub-Type Regular	Type My Info	Widget Updated
Pay Type	X	X	X	X	X		Pay Information
Extra Fields	X	X	X	X	X	X	Extra Fields
Accruals Profile	X	X	X	X	X		Profiles
Pay Calculations (for Pay Calc 2.0 only)	X	X	X	X	X		Profiles
Seniority Date	X	X	X	X	X		Dates
Frozen Benefit Date	X	X	X	X	X		Benefits
Union	X	X	X	X	X		Pay Information
Secondary Email	X	X	X	X	X	X	Personal Information
Account Custom Dates	X	X	X	X	X		Account Custom Dates in Company Setup
Access Profile	X	X	X	X	X		Profiles
Smoker						X	Account Demographics
Veteran						X	Account Demographics
Working Time Regulations	X	X	X	X	X		Profiles
Training Profile	X	X	X	X	X		Profiles
Performance Review	X	X	X	X	X		Profiles
Eye Color	X	X	X	X	X	X	Demographics
Pay Grade	X	X	X	X	X		Pay Information
Competency Profile	X	X	X	X	X		Profiles
Labor Distribution Profile	X	X	X	X	X		Profiles
Points Profile	X	X	X	X	X		Profiles
PST Population Profile	X	X	X	X	X		Profiles
Time Off Planning Profile	X	X	X	X	X		Profiles
TS Auto Population Policy	X	X	X	X	X		Profiles
Work Schedule Profile	X	X	X	X	X		Profiles
Workday Breakdown Template Profile	X	X	X	X	X		Profiles
FT Student	X	X	X	X	X	X	Account Demographics
Highly Compensated	X	X	X	X	X	X	Account Demographics
Key Employee (ESS)	X	X	X	X	X	X	Account Demographics
Visa	X	X	X	X	X	X	Account Demographics
Benefits Date	X	X	X	X	X		Dates
Review Date	X	X	X	X	X		Dates
Citizenship (US/UK)	X	X	X	X	X	X	Account Demographics
Primary Language	X	X	X	X	X	X	Account Demographics
Recruiter	X	X	X	X	X	X	Account Demographics
Secondary Language	X	X	X	X	X	X	Account Demographics
*Custom Form	X	X	X	X		X	
Default Shift Premium	X	X	X	X	X		Pay Information
EEO Classification	X	X	X	X	X		Pay Information
Retirement Plan Profile	X	X	X	X	X		Profiles
Re-Hireable			X				Termination Details
Termination Reason			X				Termination Details
Managers at Termination			X				Termination Details
Termination Notes			X				Termination Details
GL Code	X	X	X	X	X		Pay Information
HR Custom Field	X	X	X	X	X	X	HR Custom Fields
Seasonal	X	X	X	X	X	X	Account Demographics
Direct Deposit End Date	X		X				Termination Details
Earning End Date	X		X				Termination Details
Deduction End Date	X		X				Termination Details
Owner Related	X	X	X	X	X		Account Demographics
Benefits Deduction/ Earnings End Date	X		X				Termination Details
Benefit Coverage End Date	X		X				Termination Details
Termination Notice	X		X				Termination Details
Default Workers Comp Code	X	X	X	X	X		Pay Information
Custom Fields	X	X	X	X	X		HR Custom Fields
Ownership Percent	X	X	X	X	X	X	Account Demographics

HR Action Item	Type My Employee	Sub-Type Hire	Sub-Type Term.	Sub-Type Re-Hire	Sub-Type Regular	Type My Info	Widget Updated
Referral	X	X	X	X	X	X	Account Demographics
Tax Information	X	X	X	X	X		Tax Information
Assets	X	X	X	X	X		Assigned Assets (Property)
Credentials	X	X	X	X	X		Credentials (Ex: Driver License)
Benefit Salaries	X	X	X	X	X		Benefit Salaries
Limit Cost Center 1-9	X	X	X	X	X		Cost Centers
Skills	X	X	X	X	X		Skills
Height	X	X	X	X	X	X	Account Demographics
Weight	X	X	X	X	X	X	Account Demographics
Training/Certifications	X	X	X	X	X	X	Training/Certifications
Additional Compensation	X	X	X	X	X		Additional Compensation
****Benefit Plans**	**X**	**X**	**X**	**X**	**X**		**Benefit Plans Also in EIN Transfer**

Items with Single Asterisk in Table

*Social Security Number

The system will validate the number as it is entered in the field and verify that the number is 9 digits, unique, and not already assigned to another employee.

*Hire Action - Personal Settings

When using the Hire Action Item, the following personal settings can be updated and will be applied to employee accounts in the Account Information widget.

- Primary EIN
- EIN
- Username
- Password
- User Must Change Password at Next Logon
- Locked
- Salutation
- Nickname
- First Name
- Middle Name
- Last Name
- Suffix
- Employee Sync – This field applies only to Multi EIN companies and is used to synchronize employee data when an employee works across multiple EINs. When hiring an employee into a new EIN, an HR Hire action request can be initiated without specifying an applicant by entering the existing employee's SSN and birthdate and the EIN that they are hiring into. When a social security number and birthdate

matches an existing employee, the Employee Sync field appears, and the Employee Sync profile can be selected. If the SSN and birthdate match an existing employee, other personal information for the employee will display and will be pre-populated, such as *Name* and *Employee ID*. (April release - 70847)

An HR Hire Action with a Direct Deposit or Base Compensation action item will synchronize among EINs for employees.

If the employee has direct deposits, the deposits are applied to the new EIN upon approval of the HR action request. If the employee does not have direct deposits, changes made within the HR action request take precedence over the employee's existing direct deposits. (June release -72238)

For base compensation, a warning indicating that the base compensation will be synchronized from the primary EIN is displayed if the Employee Sync profile has a Base Compensation rule and the Base Compensation is added to the request. If the Employee Sync profile does not have the Base Compensation rule configured, the changes made within the HR Action request are applied. (June release - 72453)

- Job Application – This is a new field within the Hire Action and allows managers to select available jobs for the new hire or applicant. The list is pulled from defined Job Requisitions in the Recruitment module. When an active and unfilled job is selected, the system will populate values from the job requisition profile to the request details if such fields are part of the request, i.e. Cost Center, Employee Type, Default Job and other default values from the requisition.

  If the job is inactive or closed, a message will be generated to inform the user and they can proceed with the request and manually complete the job values. (April release - 67768)

  ⚠ Job Requisition is not active. If you still want to hire the applicant into that job, proceed with the request.

  ⚠ Job Requisition is closed. If you still want to hire the applicant into that job, proceed with the request.

***Direct Deposits**

(June release) 72011: Employees with appropriate permissions will see the totals deposited over time in the following columns when viewing Direct Deposit HR actions:

- Last Payroll
- Month To Date
- Quarter To Date
- Year To Date

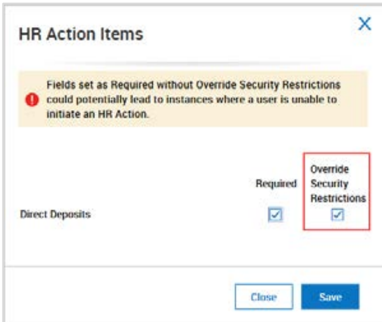
(June release) 71821: Managers adding direct deposits for their employees have access to additional fields, provided they have appropriate permission:

- Name
- Description
- Arrearage Function
- Frequency
- New Reserve Check
- Viewing, Editing and Deletion of Existing Direct Deposits

- Direct Deposit Totals including Last Payroll, Monthly To Date, Quarterly To Date and Year To Date

(June release) 74312: In the initial release of HR Actions in the New UI, users could not access all the fields that were available to Classic users. With this release, security restriction overrides now take effect for mobile app and .home users. These users now have access to the same fields available to Classic users, including: direct deposit sequence numbers, effective dates, calculation methods, account type, ABA and account numbers and totals deposited by payroll, month, quarter and year.

In addition, the override flag now enables managers and employees to reserve live checks even if the manager or employee does not have permission to do so in the security profile.



***Custom Forms -** Custom forms can be previewed or downloaded in PDF format.

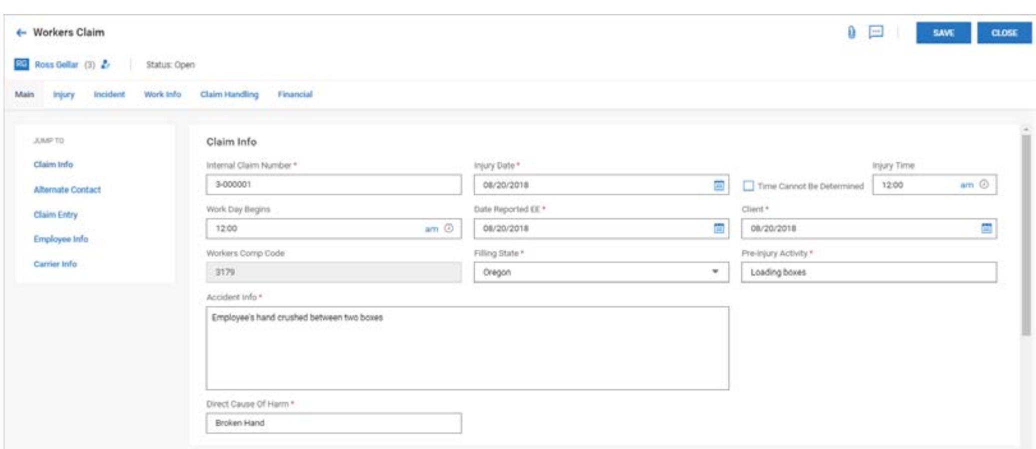
Default Setting Conflicts - When employee profiles or attributes are changed within HR Action items, there may be conflicts with other HR Action items or defaults. For example, when changing an attribute that has a default, the job default will take precedence over a company default, unless the *Allow Override at Employee Level* is set for the attribute.

New UI Updates – Functionality Added to Pages

The table below shows the updates made within the New UI and the functionality added. Shown below are example screenshots of the View/Edit pages that are representative of most areas within the product. The design on these pages have been updated to provide a clean, easy to use experience.

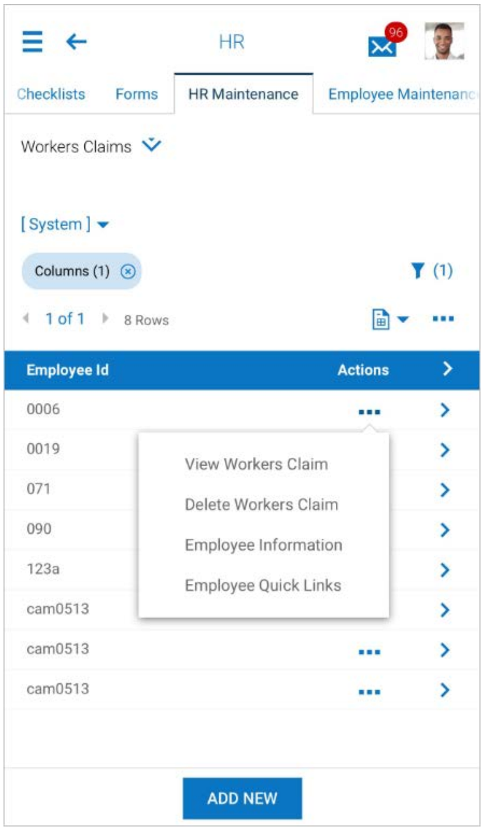
Desktop – View/Edit Page Example

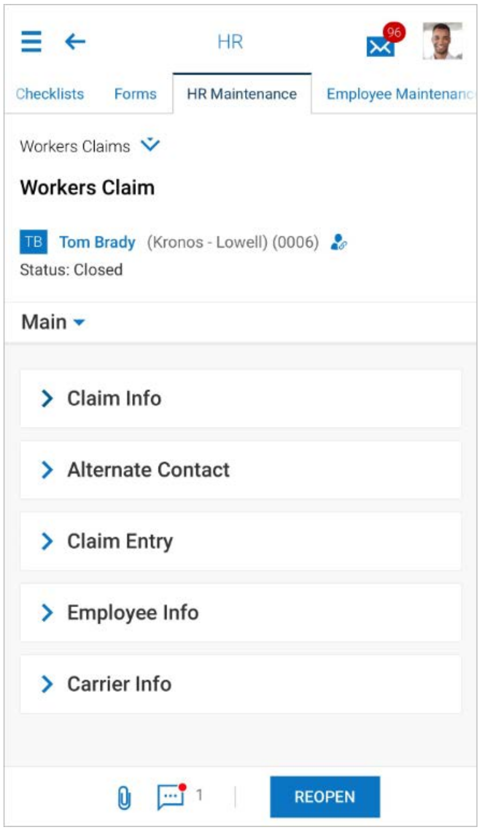
In this view, most pages will display jump links in the left panel. When clicked, these links will move you to that widget, shown on the right side of the page. Many pages have additional tabs across the top of the header. The tabs will also display jump links and widgets.

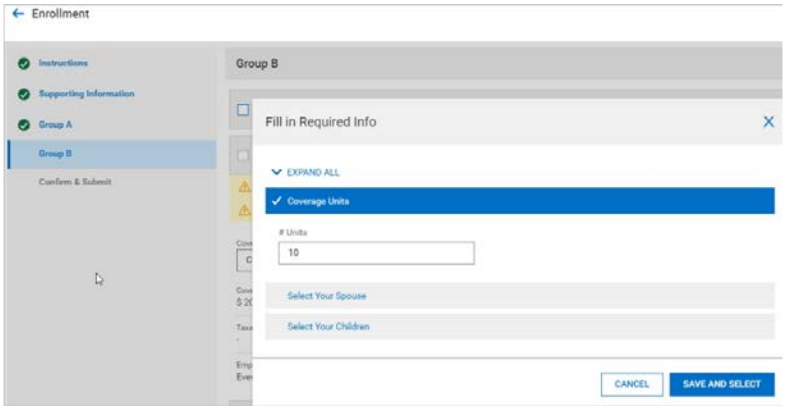


Mobile – View/Edit Page Example

In the mobile view, options will be selected from the Actions menu. When selecting the View option, the widgets will be available and can be opened for viewing/editing. Other options such as uploading documents and adding notes will be available at the bottom of the page.







New UI: Custom Forms – Fields Added to Employee Type

73610: In the New UI, when creating custom forms, adding or editing a page, and selecting *Employee* as the *Type*, new fields have been added to the *Field* drop-down as follows.

- Employee Type
- Pay Grade Name
- Pay Grade Description
- Worker Type
- Dates: Custom Date 1 – Dates: Custom Date 5

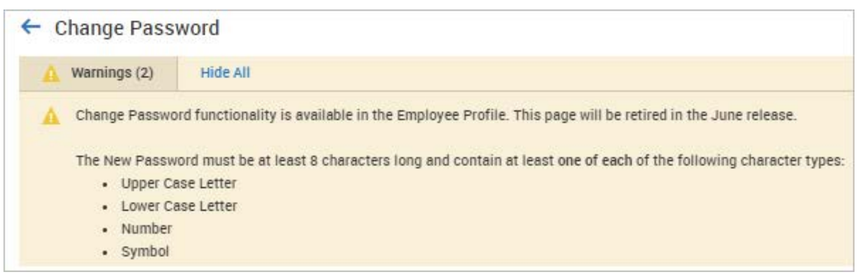
New UI: Deprecation Message Added to Account Settings & Manual Actions (Desktop)

106386: In the desktop version of the New UI, we have added messages to *Account Settings* and *Manual Actions* to inform Admins and managers that these settings are available in the Employee Profile and will be retired in the June system release.

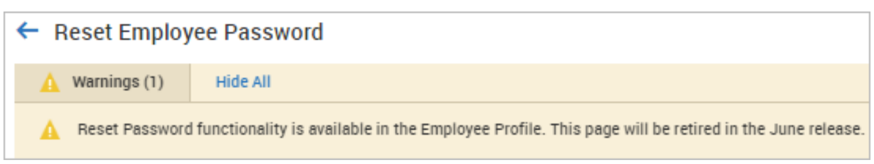
Account Settings

Team > HR > Employee Maintenance > Account Settings

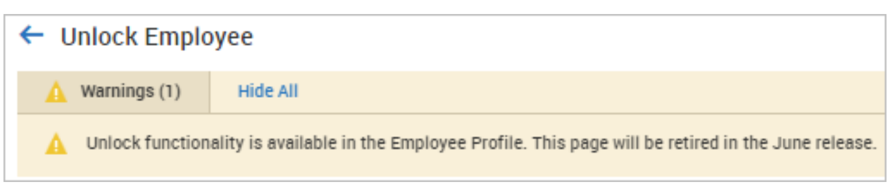
- **Change Password**



- **Reset Password**



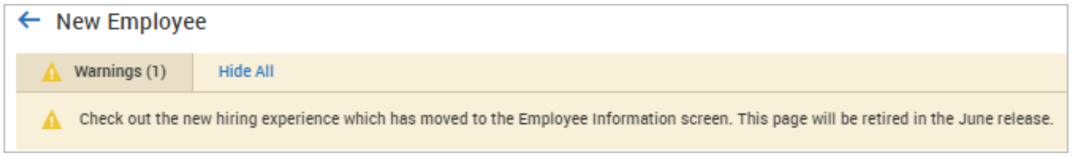
- **Unlock Account**



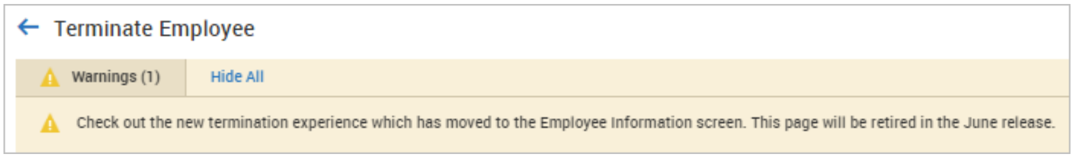
Manual Actions

Team > HR > Manual Actions

- **Hire**



- **Terminate**



New UI: Manual Hire (Mobile & Desktop)

91168 & 97890: In the February 2019 system release, we added basic hire functionality when manually hiring employees in the mobile version of the New UI. In this release, more functionality has now been added when manually hiring employees. The desktop version and mobile version will support manual hiring, with more coming in future releases.

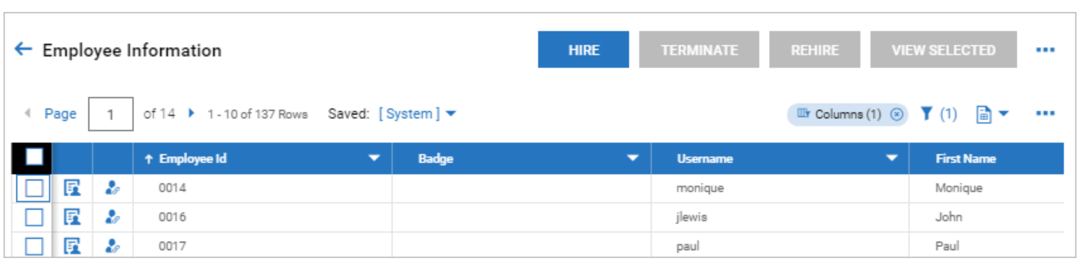
Employee Information – Manual Hire Options Added (Desktop & Mobile)

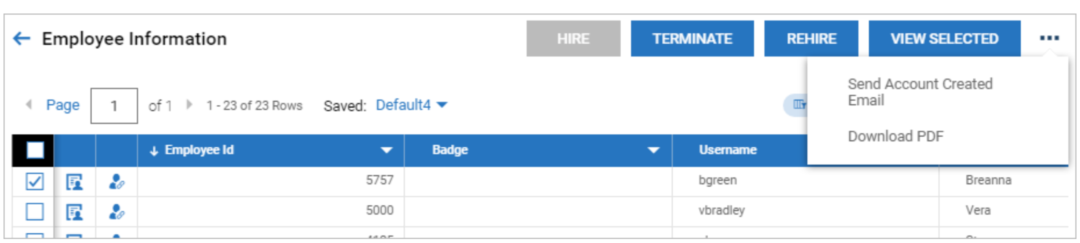
92132: The new hire functionality is located under *Team > My Team > Employee Information*. Options to *Hire*, *Terminate*, *Rehire*, and *View Selected* are available.

After selecting one or more employees in the list, the *Terminate*, *Rehire*, and *View Selected* buttons will activate along with the *Actions* icon. Under the *Actions* icon are the options of *Send Account Created Email* and *Download PDF*.

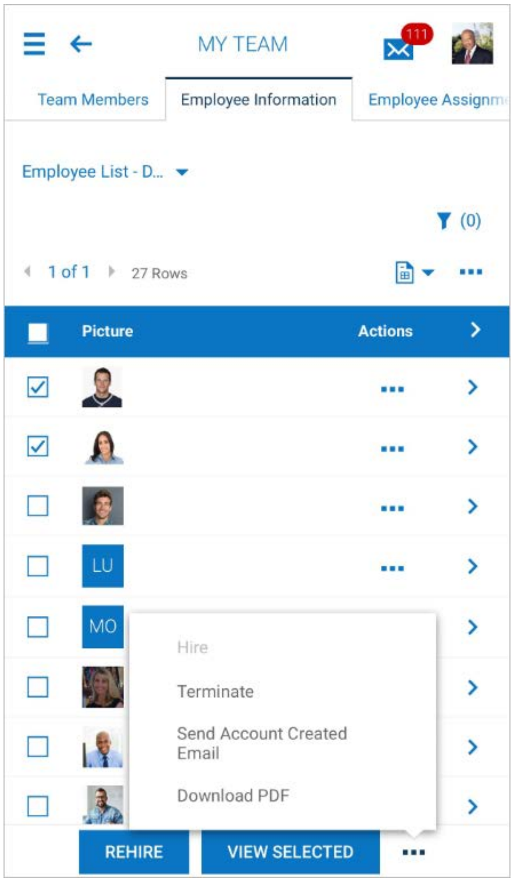
If using the *Send Account Created Email* option, you must have a notification configured. This is done under *Company Settings > Global Setup > Notifications*. Configure the *Created* notification, located under the *Account* category.

Desktop





Mobile



NOTE: In the desktop version, the *Hire* and *Terminate* options located under *Team > HR > Manual Actions* will be deprecated/removed in the June system release. Warning messages have been added to these menu items to warn users and inform them to access Employee Information. See examples above in 106386.

- Security Permissions - To provide users access to Employee Information, and give them permission to the *Hire, Rehire, and Terminate* buttons, ensure the *Employee Information (My Team)* setting under the *HR* tab is set to *View/Edit* with the *Add* checkbox checked. This is located under *Company Settings > Profiles/Policies > Security*.

Hiring via HR Actions

97890: If manually hiring employees via an HR Action, the following action items can now be added to the HR Action, dependent on the sub-systems enabled in your company. These action items are created with the *My Employee Action Request*, and are available for sub-types *Regular*, *Hire*, *Re-Hire*, and *Termination*. More will be added in future releases.

- ACA Profile
- Citizen Service Number (BSN)
- Dependent Benefits Eligibility
- Employee Contract
- Time Zone

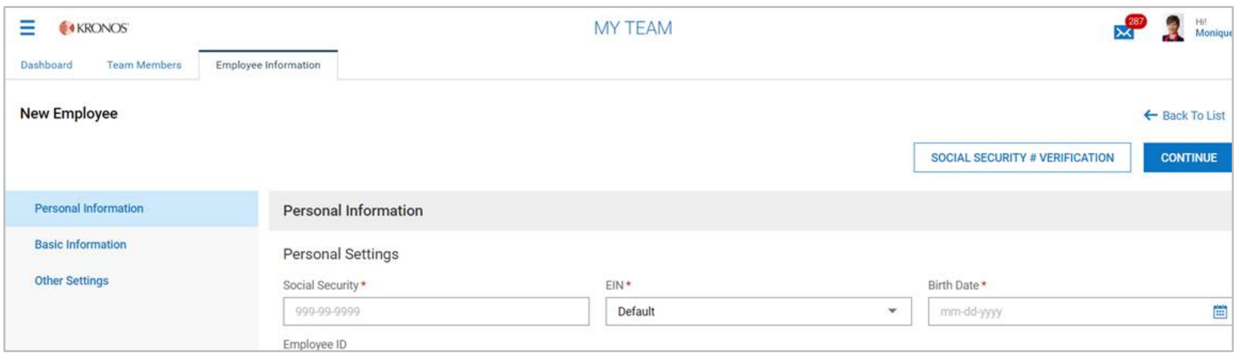
- Medical Eligibility
- Tax Information
- Scheduler Profile
- Counter Distribution Profile
- Ethnicity
- Badge ID

Other Options Added in Employee Information

In addition to the Hire, Rehire, and Terminate, the options below are available during the hiring process with some available after hiring an employee and the account being active in the system.

Social Security # Verification (New UI Desktop & Mobile)

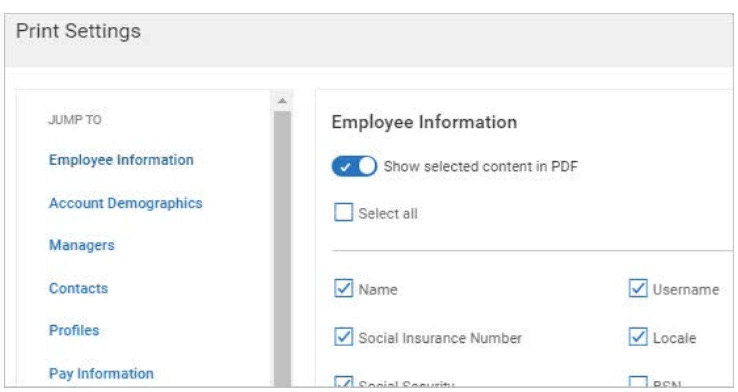
104114 & 109706: If using the *Social Security # Verification Service* Marketplace product, the *Social Security # Verification* option will now be available in the New UI when manually hiring employees. The button will display on the widget containing the Social Security field.



Download PDF (New UI Desktop & Mobile)

98138 & 92132: In the *Employee Information* page, account information for employees can now be download in PDF. The download pop-up will list all the account widgets on the left. These widget names are hyperlinked, and when clicked, will open the fields for that widget.

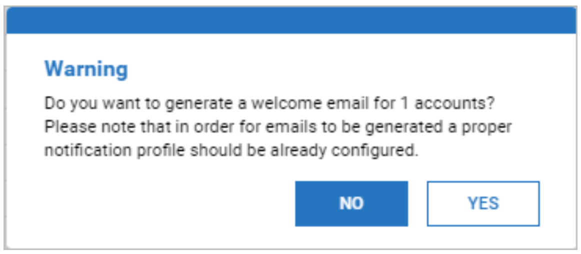
Options to turn off/on the fields is available for each widget, along with the option to select all fields in the widget. Once all are selected, individual fields can be de-selected. The *Annual Compensation Graph* has a date picker to allow to select the yearly date to sample compensation.



- Mobile: *Team > My Team > Employee Information* – Select one or more employees and select the *Actions* icon in the upper-right portion of the page and select *Download PDF*.
- Desktop: *Team > My Team > Employee Information* – Select one or more employees and select the *Utilities* button and then select *Download PDF*.

Send Account Created Email (New UI Desktop & Mobile)

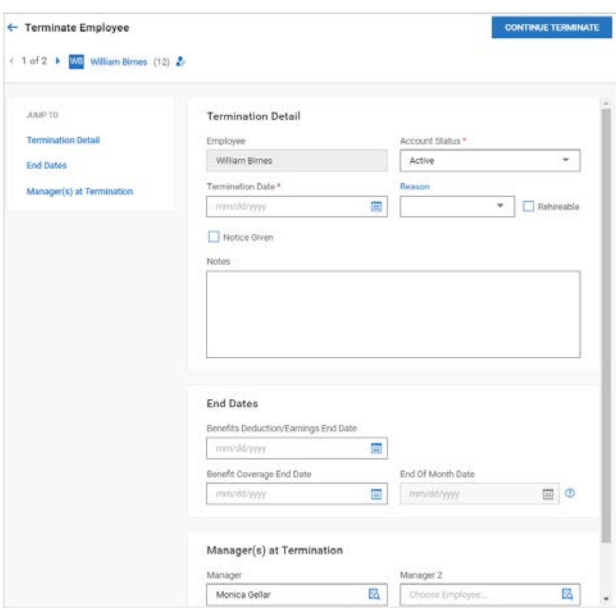
98137: In the *Employee Information* page, the *Send Account Created Email* option will send a welcome email to newly hired employees. A *Created* notification must be configured in the system for the email to be sent. The *Created* notification is located under *Company Settings > Global Setup > Notifications*, in the *Account* category.



- Mobile: *Team > My Team > Employee Information* – Select one or more employees and select the *Actions* icon in the upper-right portion of the page and select *Send Account Created Email*.
- Desktop: *Team > My Team > Employee Information* – Select one or more employees and select the *Utilities* button and then select *Send Account Created Email*.

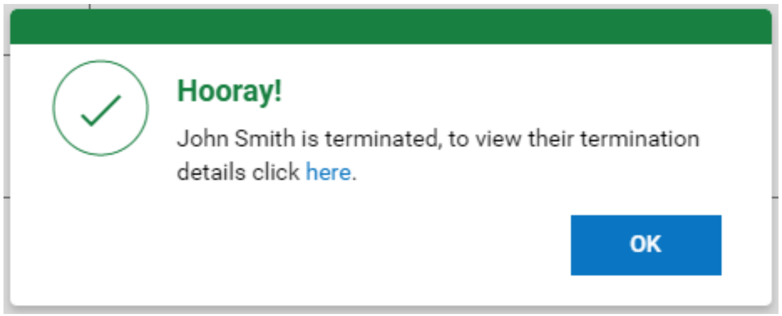
Terminating Employees & Termination Details (New UI Desktop & Mobile)

107653, 91170: When terminating employees, you can select one or more employees and use the *Terminate* option in *Employee Information*. Termination details will display with *Jump To* links on the left and widgets on the right. If more than one employee is included, you can use the directional arrows to roll forward and backward in the selections. To cancel termination, use the back arrow next to the *Terminate Employee* label.



Additional Termination Details

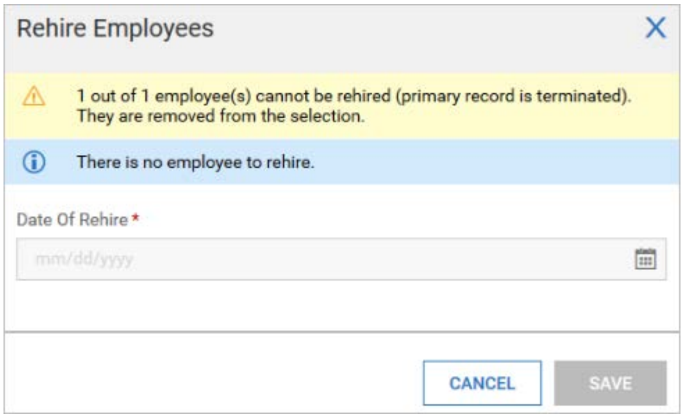
When termination is complete a link will be available in the confirmation pop-up, and when clicked, will display termination details.



Re-Hiring in Multi EIN Companies (Classic UI & New UI)

105252, 109636 & 74291: In the case of a primary account being terminated, if attempts are made to re-hire an employee into a secondary EIN, a warning message will display informing you that the employee cannot be re-hired because the primary record is terminated.

To correct the warning, you should edit the employee account and set the secondary EIN as the primary. After doing this, you can then re-hire the employee.



Required and Default Settings for Fields in Global Setup Based on EIN (New UI)

99848: For Multi EIN companies using the New UI, the required and default values that are set in Company Setup, and used when manually hiring employees, will now be supported as they are in the Classic UI. This will also apply when using the Hire HR Action.

New UI: Recruitment

The following enhancements have been completed for the Recruitment module in the New UI.

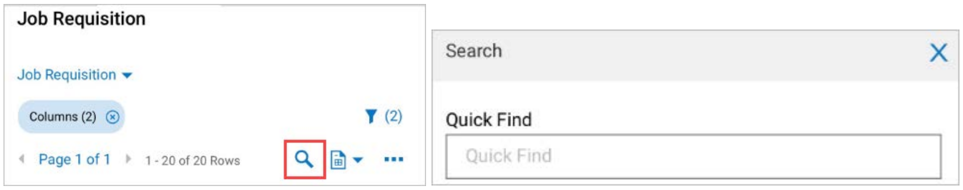
Recruitment: Search Windows Moved to Main Page in Job Requisitions & Job Applications

94251: Within the New UI version of the Recruitment module, the search windows have been moved outside the filter panel and now display on the front page. After adding search criteria, the search can be launched by using the Enter key for desktop, Return for iOS, and Go for Android.

- **Job Requisitions**: The ***Quick Find*** search field has been moved to the front page.
  - Located under: *Team > HR > Recruitment > Job Requisitions*

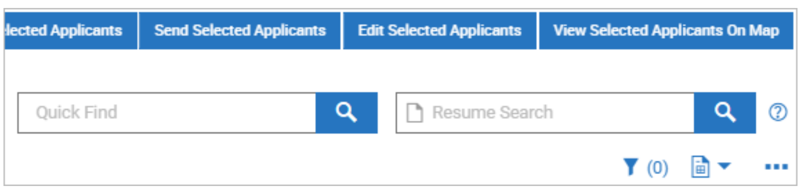
    Desktop

    Mobile

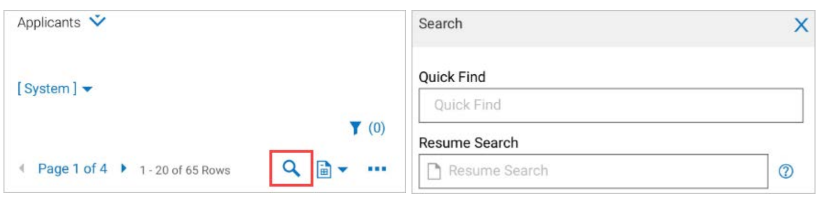


- **Job Applications**: The ***Quick Find*** and ***Resume Search*** fields have been moved to the front page. The *Resume Search* field contains a Help icon explaining how to construct the syntax for the search.
  - Located under: *Team > HR > Recruitment > Candidates > Applicants*

    Desktop

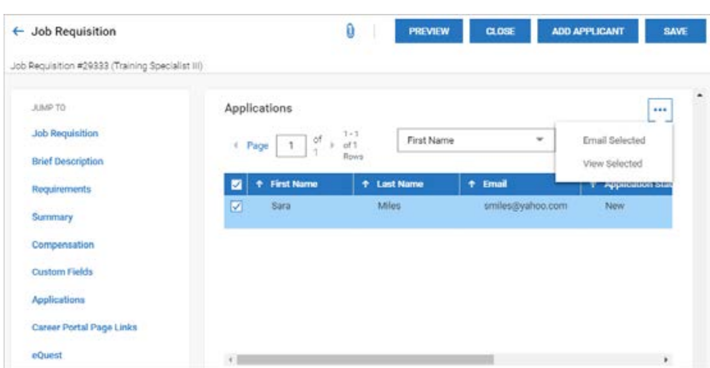


    Mobile



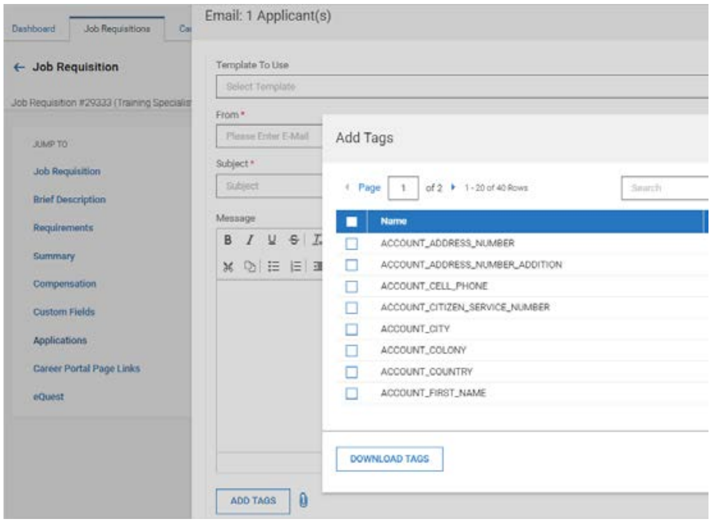
Recruitment: View Selected & Email Selected Added to Applications Widget in Job Requisitions

101620: Within the *Applications* widget of the *Job Requisitions* edit page, the ***View Selected*** and ***Email Selected*** options have been added to the *Actions* icon. This is available in desktop and mobile.



Recruitment: Downloading Email Tags Added to Email Applicants

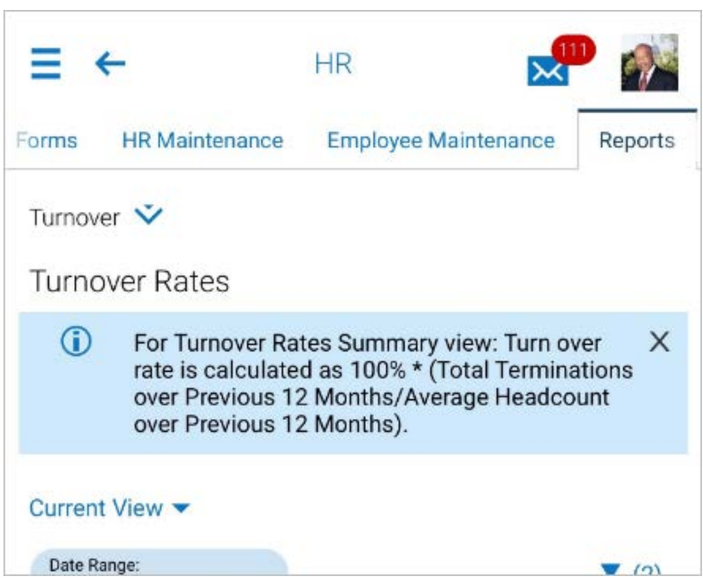
100963: When selecting the *Email Selected* option with the *Applications* widget of *Job Requisitions*, the Email screen supports the adding of system tags to be used in the email message. When selecting the *Add Tags* button, the pop-up will now support the downloading of tags via the ***Download Tags*** button. This is available in desktop and mobile.



New UI: Reports

Rate Formula Added to Turnover Rates Report (Mobile)

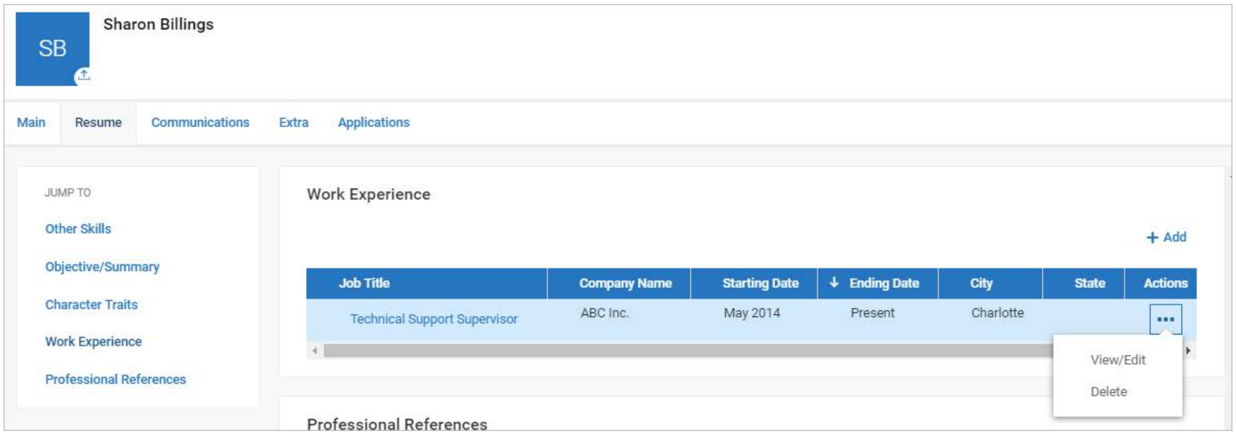
86023: The turnover rate formula has been added to the Summary View of the Turnover Rates report in the New UI Mobile Experience. This rate message is already available in the Desktop Experience. In mobile, the report is located under *Team > HR > Reports > Turnover > Turnover Rates*.



New UI: Work Experience Widget Available for Applicants

107321: In the New UI, the *Work Experience* widget is now available to managers to view and/or edit, dependent on the user's permission. This is located under *Team > Recruitment > Candidates > Applicants*, and then viewing an applicant's resume. As with the Classic UI, you can have up to 10 total companies with 5 positions for each company.

This is available for both the desktop and mobile experiences.



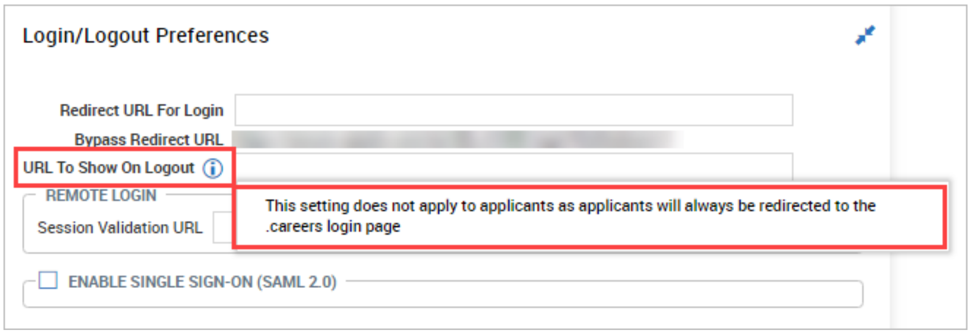
Admin Enhancements

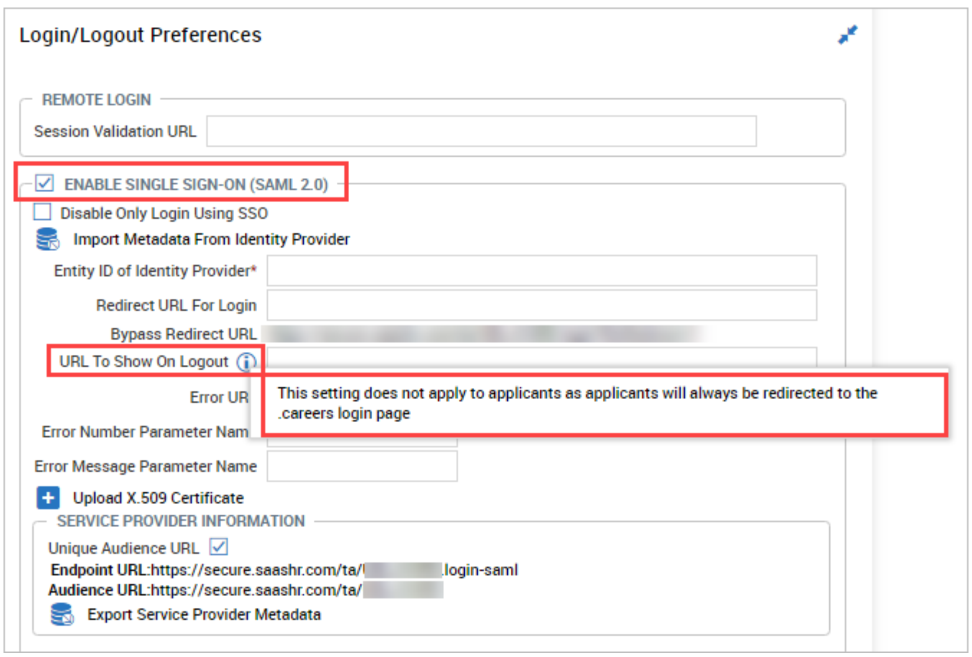
The following administrative enhancements have been added to this release.

Behavior of *URL To Show On Logout* Setting

96275: The *URL To Show On Logout* setting in the *Login/Logout Preferences* widget will no longer apply to applicants. Previously, if a URL was entered in this field, applicants were redirected to a logout page. We have now added an information icon informing users that the setting will not apply to applicants and they will be redirected to the .careers login page. This behavior is supported with and without SSO enabled.

This widget is available when editing a company from *Maintenance > Companies > All System Companies*.





Resolved Issues

The following issues have been resolved with this release.

Timesheet Auto Population Profile Requiring Visa Type Expiration

105000: Previously when a Timesheet Auto Population Profile was enabled as required and then added to an employee account, and a Visa Type within the Account Demographics widget was entered, the system generated an error requiring an expiration date for the Visa. Removing the profile allowed the account to be saved. However, once a Visa Type has been selected, all fields related to the Visa are required for Visa information to be populated upon saving. A new warning message has been added to inform users to enter this information; *All Visa information is required for the Visa type field to be populated upon saving*.

IN & NOT IN Filter Options Missing From Numeric Employee ID Filter List

104568: The *In* and *Not In* filter options in the drop-down for the *Employee ID* column of the *Employee Information* report page are now available again. After the last system release, some companies reported these options were no longer available.

Job Requisition Will Not Save - Cost Center Required Error

104136: When requiring cost centers on Job Requisitions, and not entering the required cost centers, an error message was generated for new and existing requisitions as expected. After removing the requirement for cost centers, the error message persisted, and requisitions could not be saved without entering the cost center information. Moving forward, the error message will no longer display after turning off the cost center requirement.

N/A Middle Initial Does Not Carry Over To Page 2 & 3 On I9

103098: When completing an I9 form, if an employee did not have a middle name, N/A was entered in the middle initial field. On page 2 and 3 of the form, the middle initial did not carry over from what was entered on page 1, but now will.

Manager Can See Employees' Actual Marital Status

102853: Managers who did not have authority to view their employees' Actual Marital Status were able to view this data when viewing the Employee Information report page. Moving forward, managers will not be able to view this data if their security profile does not allow it.

Error Message Generated When Applicant Has Same Email Address as Account Contact

102199: Previously, when an applicant attempted to create an account using the same email address as one of their account contacts, an error message was generated, and the applicant was unable to proceed. This error will no longer occur, and applicants can now enter the same email address as account contacts.

Deleted Employees with OSHA Recordable Workers Claims Populating on OSHA Form 300

102020: When employees with OSHA Recordable Workers Claims were deleted from the system, they still populated on OSHA Form 300, requiring manual editing. This has been corrected and deleted records will no longer populate Form 300.

Custom Field not Showing Asterisk when HR Action field is Required

101637: In the New UI, when an HR Action item was marked as required, the typical red asterisk indicating a required field, did not display to the manager completing the HR Action. Moving forward, required fields will display the red asterisk.

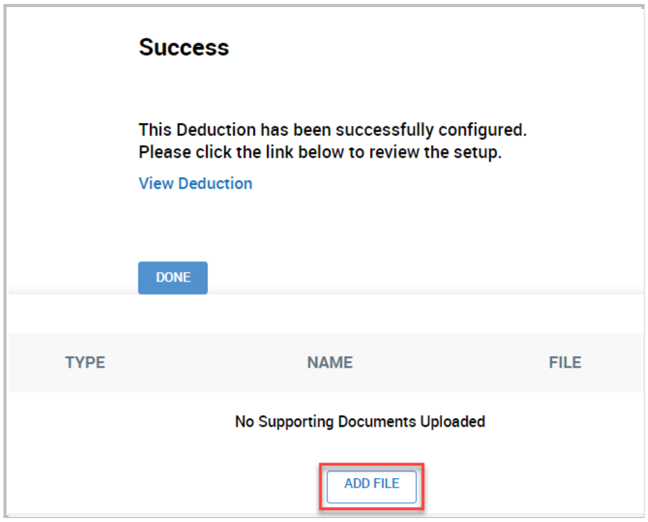
Payroll

Deduction Wizard

The following enhancements have been completed for the Deduction Wizard.

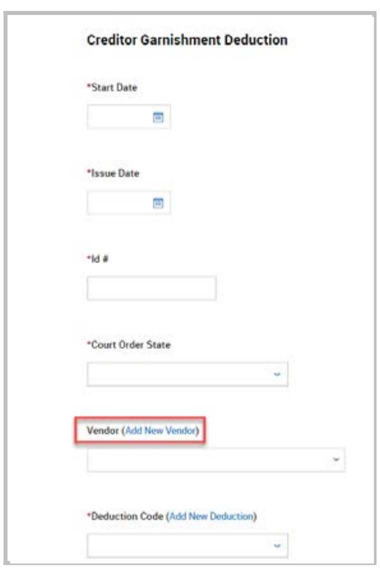
Deduction Wizard: Option to Upload Documents

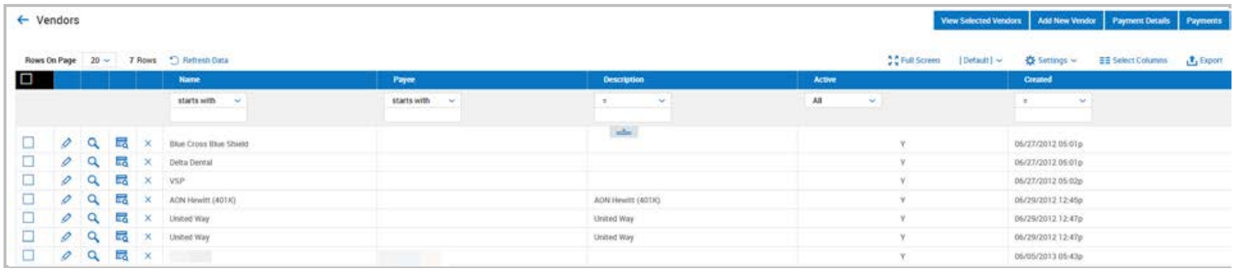
Users can now upload supporting documents while setting up a deduction within the Deduction Wizard. The option to *Add File* is available in the *Success* screen, the final screen once the deduction has been configured.



Deduction Wizard: Add New Vendor in Deduction Wizard

A link, *Add New Vendor*, has been added to the Deduction Wizard to allow a new vendor to be added from within the wizard, much like the *Add New Deduction* link allows users to add a new Deduction Code. The *Add New Vendor* link takes users with the appropriate security access to the *Company Settings > Payroll Setup > Vendor* screen, where they can select and add a new vendor. Once the new vendor has been added, the user can return to the wizard and complete the deduction setup.





Forms

The following enhancements have been completed for Forms.

Forms: 2019 Federal W-4 Form

The W-4 forms for 2019 are now available.

Forms: 2019 Federal W-4 Form for Select States

The Federal 2019 W-4 Form is now available for Colorado, Delaware, Idaho, Montana, Nebraska, New Mexico, North Dakota, Utah, and South Carolina. In the New UI, Montana was previously missing from the list of states that use this W-4 form but has now been added.

Forms: 2019 W-4 Form for Oregon

Oregon now has their own W-4 form, and the Oregon W-4 form for 2019 is now available for use in the system.

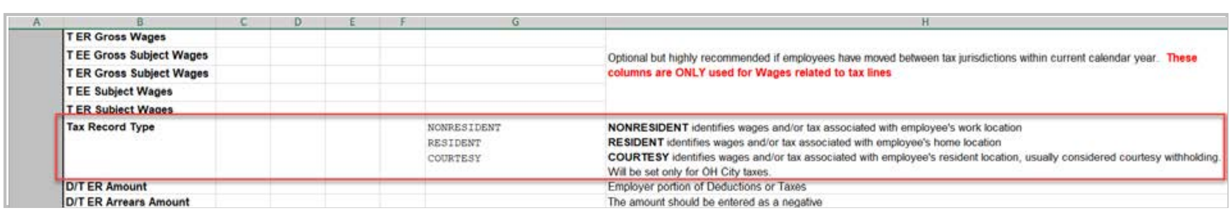
Forms: 2019 W-4 Form for Missouri

The Missouri W-4 form has been simplified and reformatted, and the Missouri W-4 form for 2019 is now available for use in the system.

Imports: Updated Employee Payroll History Import

The *Tax Record Type* field/column has been added to the Employee Payroll History import template. The Instructions sheet has been updated to provide valid formats/values as well as a detailed description of what the column should be used for.

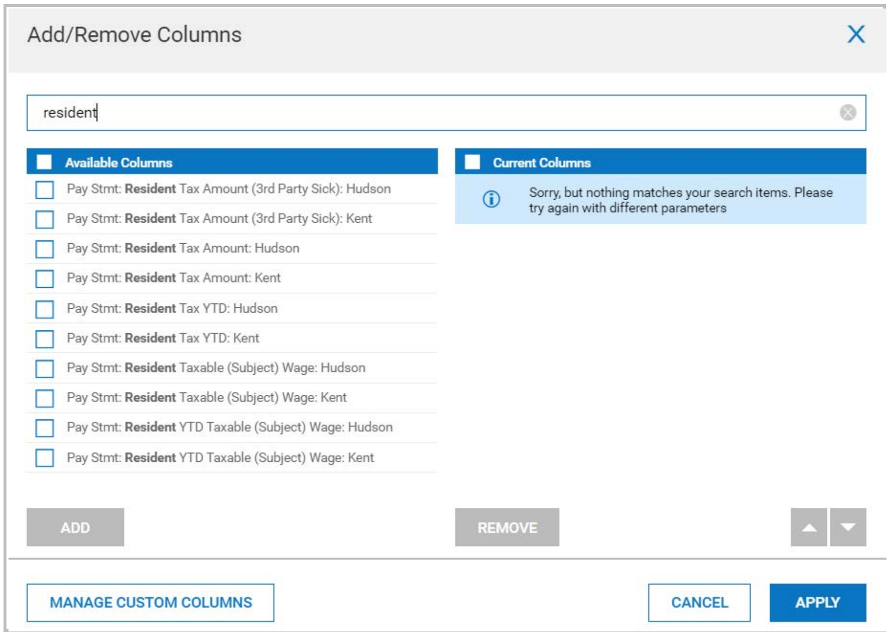
- **NONRESIDENT** identifies wages and/or tax associated with employee's work location.
- **RESIDENT** identifies wages and/or tax associated with employee's home location.
- **COURTESY** identifies wages and/or tax associated with employee's resident location, usually considered courtesy withholding. This will be set only for Ohio City taxes.

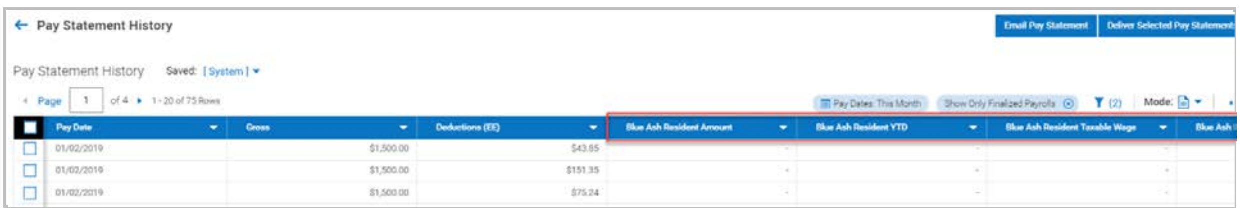


Reports: Resident Wage and Tax Details on Pay Statement History Report

Resident (courtesy) Wage and Tax Detail columns can now be included in the Pay Statement History Report via *Select Columns* or *Add/Remove Columns* (*My Reports > Payroll > Pay Statement History* or *My*

Team > Payroll > Reports > Pay History). Adding columns for the Resident wages and taxes allows the resident and work records to display separately.

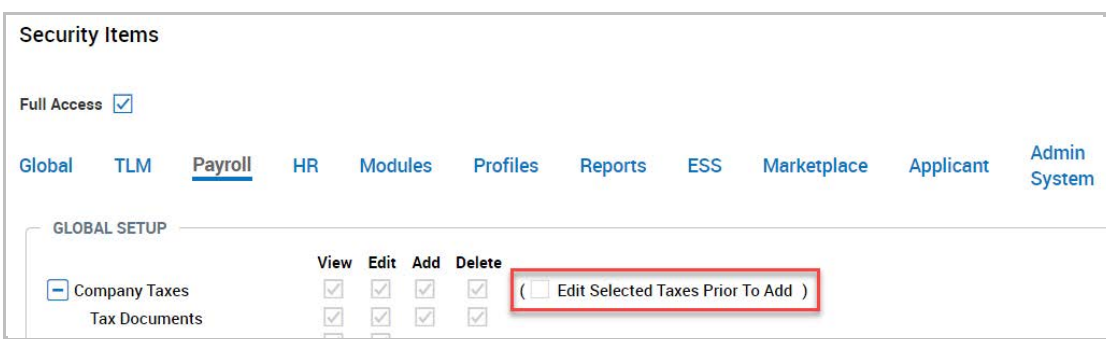




NOTE: Currently, the system only identifies resident/courtesy wage and tax amounts for the state of Ohio, as no other locals have this requirement.

Security Profiles: Company Tax Security Settings to Edit before Adding

A new security setting, *Edit Selected Taxes Prior To Add*, can now be enabled to allow users to update tax record fields before adding the tax record. This option works in conjunction with the Company Taxes security settings for *View*, *Edit* and *Add*.



If multiple taxes are selected, the system will present a wizard-like window where users can toggle between the selected taxes, update as needed, and save.

Standard messaging will display such as Invalid EIN format, Success, Saved, etc.

Tax Tables: 2019 State and City Minimum Wages

The State and City Minimum Wage tables have been updated accordingly for 2019.

Washington FLI Tax Setup – Employee and Employer Calculation

The Washington FLI premium is .4% of an employee's gross wages. In the Washington FLI tax settings, the system has now been updated so that the percentage withheld from the employee's pay and the percentage paid by the employer can now be entered separately. The system calculates the premium due (.4% of the employee's gross wages) and withholds the EE Rate percentage of that amount. The employer pays the ER Rate percentage. The calculation is based on the gross wages earned by the employee each payroll until the annual gross wage limit of $132,900 is reached.

This configuration is designed to provide flexibility to employers in defining the percentage of the premium that is paid. Employers should be careful to observe the regulations when setting EE and ER Rates. The limits and exceptions in the regulation are described below, but to provide an appropriate level of flexibility, the system ***does not*** validate the rates to ensure that the regulations listed below are followed.

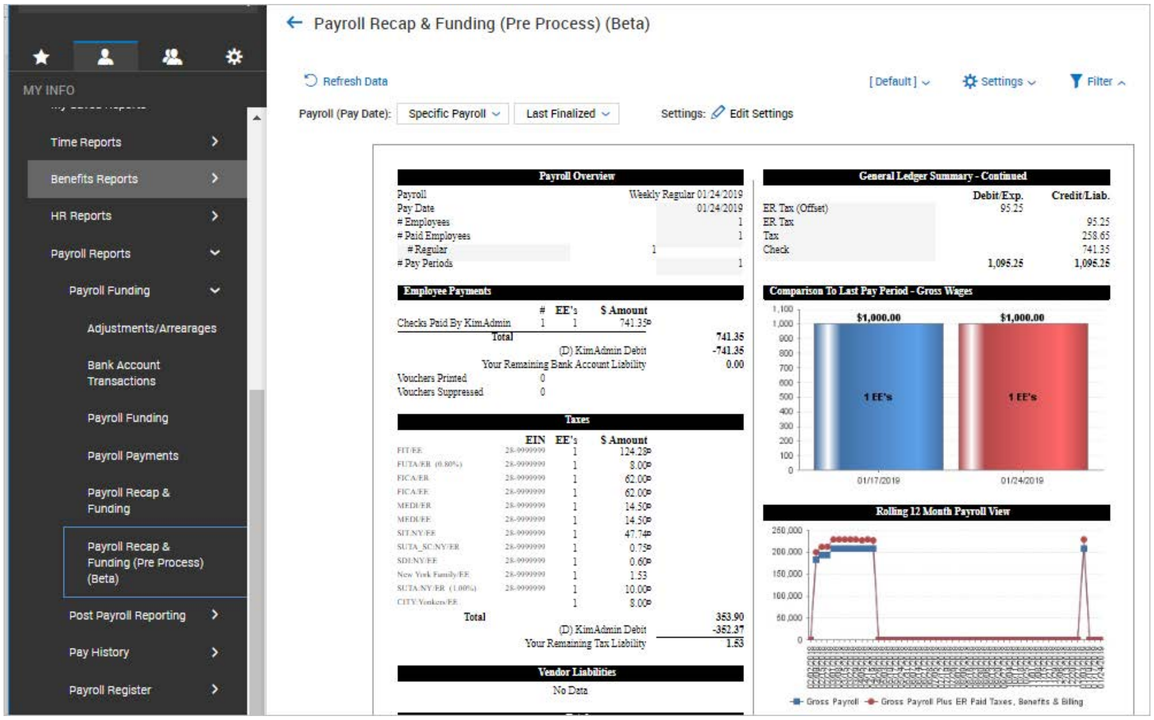
According to the regulation, employers who choose to withhold premiums from their employees can withhold up to 63.33% of the total premium. Employers would then be responsible for the paying the other 36.67% of the total premium. Employers can elect to pay all or some of the employees' portion of the premium on their behalf.

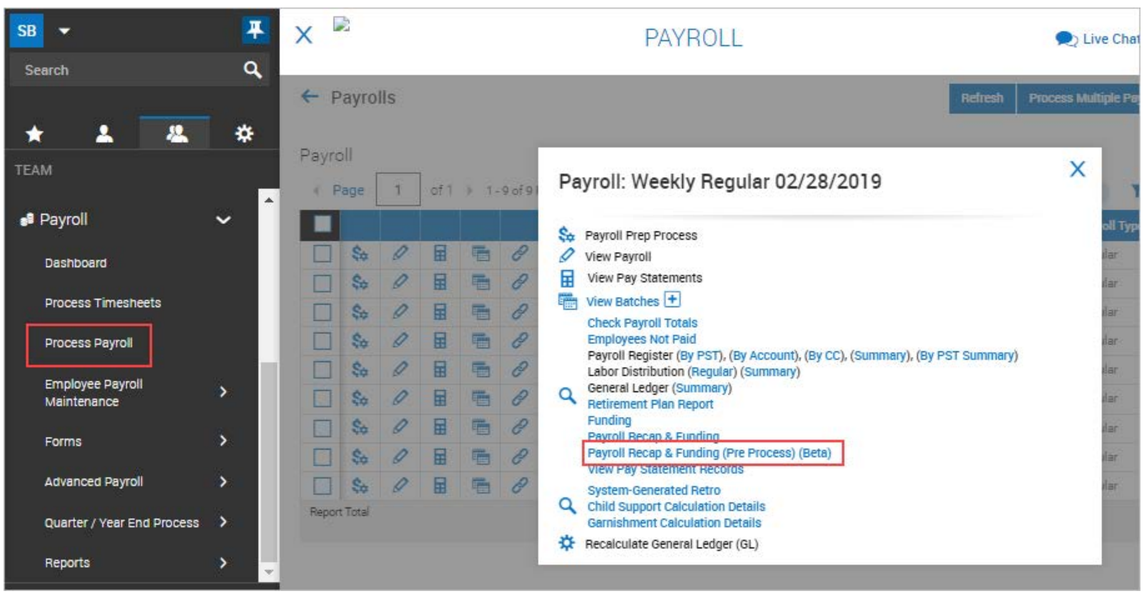
Employers with under 50 employees ***are not*** required to pay the employer portion of the premium. The Employment Security Division will determine the size of your business based on the first quarter 2019 return for the entire 2019 tax year. The system will not calculate the employee count. The user will be responsible in determining the business size for 2019.

Payroll Recap & Funding (Pre Process) (Beta) Report

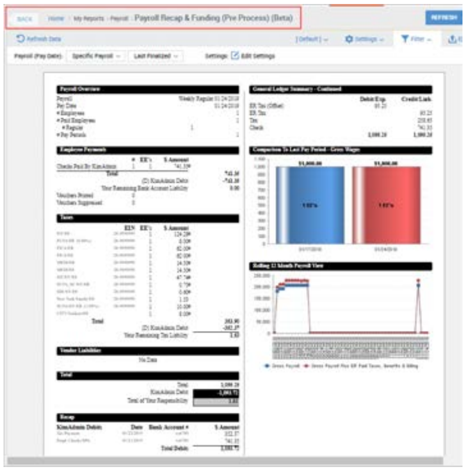
A new *Payroll Recap & Funding Report (Pre Process) (Beta)* is now available. This report will show total funding (less invoice amount) at all stages of the payroll process. The report is available in both the New and Classic UIs.

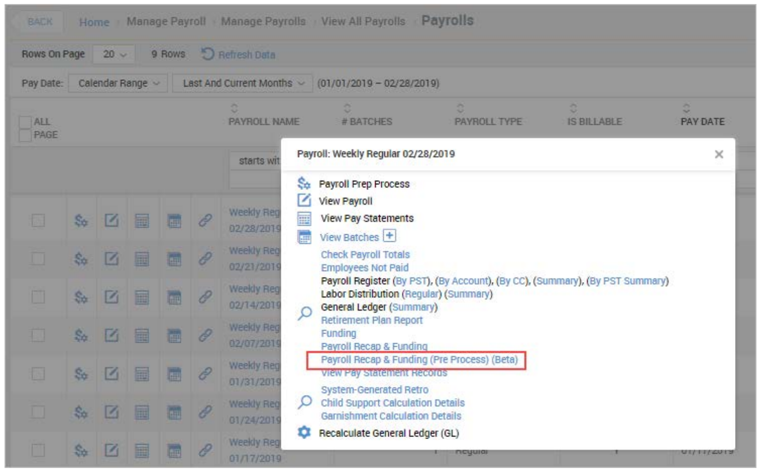
In the New UI, the report can be accessed from the *Payroll Recap & Funding (Pre Process) (Beta)* report under *My Info > My Reports > Payroll Reports* or by clicking the *Payroll Quick Links* icon from a specific payroll in the *Payroll > Process Payrolls* report.





In the Classic UI, the report can be accessed from *My Reports > Payroll > Payroll Recap & Funding (Pre Process) (Beta)*, or by clicking on the *Payroll Quick Links* icon for a specific payroll under *Manage Payroll > View All Payrolls*.





Mobile Application: Historical Pay Statements not in Default EIN

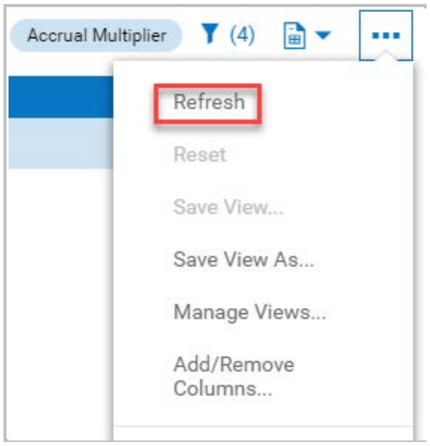
Employees in multi-EIN companies can now view historical Pay Statements from non-default EINs within the mobile app under *My Info > My Pay > Pay History*, on the *Historical* tab.

Pay Statements: Sequence Numbering for Printed Pay Statements/Checks (Classic and New UI)

Sequence numbering has been added to the outside of printed Pay Statements/checks to easily identify where the item belongs in a group of printed pay statements/checks. The numbering prints the numerical order in which the Pay Statements were produced. This helps to ensure that the check will be properly routed and delivered to the correct recipient. A sequence number now appears in the upper left-hand corner above the return address on the outside of the printed Pay Statements.

Reports: Refresh Option in New UI (New UI)

The Refresh option, heavily used for Payroll reports in the Classic UI, is now available throughout Payroll pages/reports (and all other reports) in the New UI and the Mobile App.

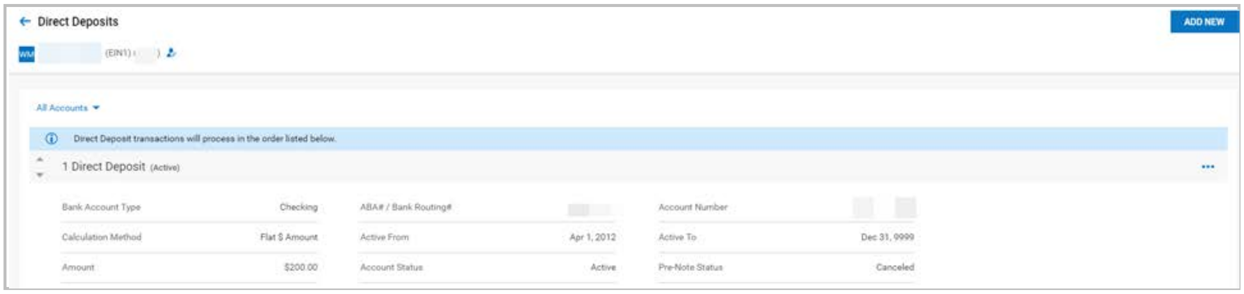


New UI Updates – Functionality Added to Pages

The table below shows the updates made within the New UI and the functionality added. Shown below are example screenshots of the View/Edit pages that are representative of most areas within the product. The design on these pages has been updated to provide a clean, easy to use experience.

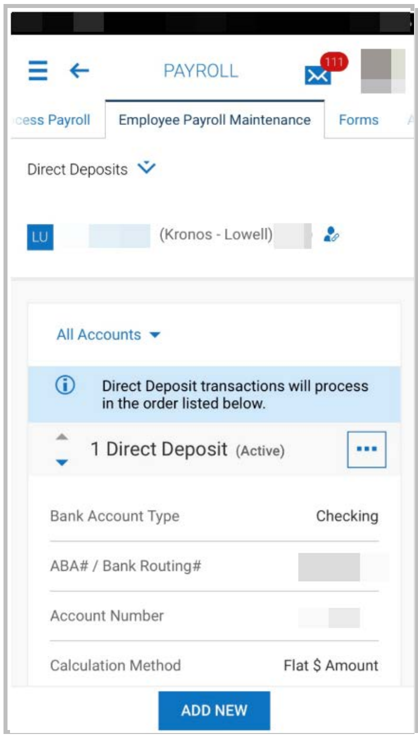
Desktop – View/Edit Page Example

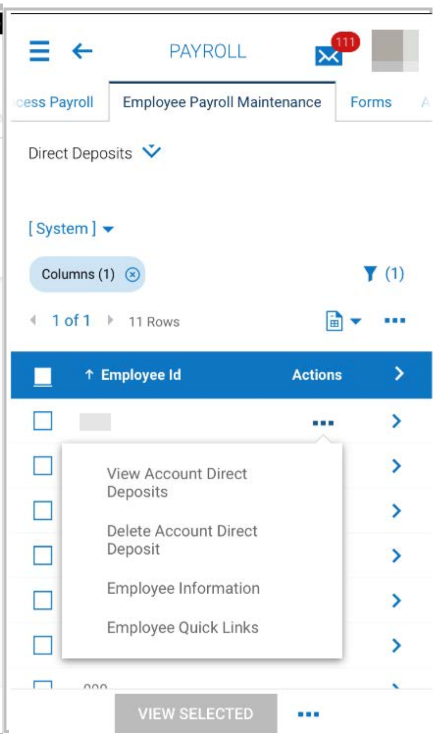
In this view, many pages will display jump links in the left panel. When clicked, these links will move you to that widget, shown on the right side of the page. Many pages will also have additional tabs across the top of the header. The tabs will also display jump links and widgets.



Mobile – View/Edit Page Example

In the mobile view, options will be selected from the Actions menu. Where applicable, when selecting the View option, the widgets will be available and can be opened for viewing/editing. Other options such as uploading documents and adding notes will be available at the bottom of the page.





Resolved Issues

The following issues have been resolved with this release.

System Data Export for Form WH-347 Signature Page

The signature page for the Form WH-347 no longer prints after each page but will now print after each project included in the export. Certification/Signature pages now only appear after pages with employees when the employees have the same Certified location assigned, and after each employee when employees have different Certified locations.

NY FLI Rate for 2019

The New York FLI tax rate has been updated for 2019 to .153%, and the correct tax limit of $107.97 is now applied.

Accrual Balances for a Payroll Only Company

When a company is using Accruals, and has only the Payroll module enabled, users are now able to observe accrual balances in the Mobile App and the New UI Desktop Experience.

Admin Resolved Issues

The following administrative issues have been resolved with this release.

Sort by Cost Center Columns in Admin Company

74248: Users are now able to sort and filter successfully by cost center columns under *Maintenance > Administration > Payroll Processing* when opening the list of Pay Statements, and errors are no longer displayed.

Saved Vendor Reports Not Displayed in My Saved Reports

89850: All saved views of Vendor reports (*Maintenance > Companies > Client Resources > Payroll > Vendors*) are now displayed correctly under My Saved Reports.

Saved Account Taxes Reports Not Displayed in My Saved Reports

93793: All saved views of Account Taxes reports (*Maintenance > Companies > Client Resources > Payroll (Taxes) > All Taxes)* are now displayed correctly under My Saved Reports.

Payroll Legislative Updates

Federal Legislative Updates

No Federal Legislative Updates were made in the **2019-R2** Tax Engine Release.

State and Local Legislative Updates

Alabama

- The Goodwater, Alabama City Tax, 01-000-159683-CITY-000, Maximum Annual Withholding Limit has been updated to $150, effective 1/1/2019.
- The Alabama State Income Tax, 01-000-0000-SIT-000, Tax Tables have been updated, effective 1/1/2019.
- The Fort Deposit, Alabama City Tax, 01-000-118518-CITY-000, has been removed from the Tax Engine, effective 1/1/2019.

Alaska

- The Alaska State Unemployment Insurance Tax, 02-000-0000-SUI-000, Wage Base has been updated to $39,900, effective 1/1/2019.

Colorado

- The Colorado State Income Tax, 08-000-0000-SIT-000, Tax Tables and Allowances have been updated, effective 1/1/2019.

District of Columbia

- The District of Columbia Paid Family Tax, 11-000-0000-FLI-000, has been added to the Engine with a rate of .62%, effective 4/1/2019. Though the Tax is not technically in effect until 7/1/2019, it was entered effective 4/1/2019 so that employers can begin their calculations for their accruals.

Hawaii

- The Hawaii State SDI Tax, 15-000-0000-SDI-000, Weekly Taxable Amount has been updated, effective 1/1/2019.

Kentucky

- The Cumberland County, Kentucky OLF Tax, 21-057-0000-OLF-000, Rate has been updated to 1.75%, effective 4/1/2019. The Maximum Annual Withholding remains $750, which adjusts the Wage base to $42,857.15.

- The Vine Grove, Kentucky OLF Tax, 21-000-506053-OLF-000, Rate has been updated to 2%, effective 4/1/2019.

  The West Liberty, Kentucky OLF Tax, 21-000-516279-OLF-000, Rate has been updated to 1%, effective 4/1/2019.

Massachusetts

- The Massachusetts State Tax, 25-000-0000-SIT-000, Tax Tables have been updated, effective 1/1/2019.

  The Massachusetts State Income Tax, 25-000-0000-SIT-000, Flat Supplemental Rate has been updated to 5.05%, effective 1/1/2019.

Mississippi

- The Mississippi State Income Tax, 28-000-0000-SIT-000, Standard Deduction and Brackets have been updated, effective 1/1/2019.

Missouri

The Missouri State Income Tax, 29-000-0000-SIT-000, Flat Supplemental Rate has been updated to 5.4%, effective 1/1/2019.

Ohio

- The Conesville, Ohio City Tax, 39-000-1048625-CITY-000, Rate has been updated to .5%, effective 1/1/2019.
- The Mount Gilead, Ohio City Tax, 39-000-1065069-CITY-000, Tax Credit and Credit Limit have been updated to zero, effective 12/26/2018.
- The Patterson, Ohio City Tax, 39-000-1057914-CITY-000, Rate has been updated to .5%, effective 1/1/2019.
- The Woodlawn, Ohio City Tax, 39-000-1048082-CITY-000, Rate has been updated to 2.3%, effective 1/1/2019.
- The Brimfield Tallmadge JEDD Tax, 39-000-0000-JEDD-006, Rate has been updated to 1.5%, effective 1/1/2019.
- The Macedonia Northfield Center Twp JEDD Tax, 39-000-0000-JEDD-024, Rate has been updated to 2.5%, effective 1/1/2019.
- The Germantown City, Ohio City Tax, 39-000-1064716-CITY-000, Rate has been updated to 1.50%, effective 1/1/2019.
- The Gateway Revenue Sharing JEDD Tax, 39-000-0000-JEDD-018, Rate has been updated to 2.5%, effective 1/1/2019.
- The Heath, Ohio City Tax, 39-000-1056322-CITY-000, Credit Limit has been updated to 1.5%, effective 1/1/2019.
- The IX Center Revenue Sharing JEDD Tax, 39-000-0000-JEDD-021, Rate has been updated to 2.5%.
- The Reynoldsburg Enterprise Zone JEDD Tax, 39-000-0000-JEDD-037, Rate has been updated to 2.5%.

- The Rossford Toledo JEDZ Tax, 39-000-0000-JEDD-038, has been removed from the Engine as this was confirmed as never having been in effect due to rule changes regarding JEDZ after it was created.
- The Indian Hill, Ohio City Tax, 39-000-1079598-CITY-000, Rate has been updated to .525%, effective 1/1/2019.
- The Mount Blanchard, Ohio City Tax, 39-000-1043538-CITY-000, has been added to the Tax Engine with a Rate of 1%, effective 1/1/2019.

  The Mount Gilead, Ohio City Tax, 39-000-1065069-CITY-000, Tax Credit and Credit Limit were previously removed with an effective date of 12/26/2018. This has been changed to an effective date of 1/1/2016.

Oklahoma

- The Oklahoma State Tax, 40-000-0000-SIT-000, Tax Tables have been updated, effective 1/1/2019.

Oregon

- The Lane Transit Tax, 41-000-0000-ER_TRANS-002, Rate has been updated to 0.74%, effective 1/1/2019.
- The Trimet Excise Tax, 41-000-0000-ER_TRANS-003, Rate has been updated to 0.7637%, effective 1/1/2019.

Pennsylvania

- The Erie, City of -EIT -Erie City S D (252602) Tax, 42-049-1215209-EIT-252602, Rate has been updated to 1.65%. This was confirmed by Berkheimer who stated all Employees and Employers in the District had been notified in writing.
- The Saint Mary's City -EIT -Saint Mary's A S D (248003)) Tax, 42-047-1215203-EIT-248003, Rate has been updated to 1.20%. This was confirmed by Berkheimer who stated all Employees and Employers in the District had been notified in writing.
- The Franklin, Borough of - EIT - Conemaugh Valley S D (111403), Pennsylvania EIT Tax, 42-021-1215021-EIT-111403, Rate has been updated to 1.3%, effective 1/1/2019. This was confirmed by Berkheimer who stated all Employees and Employers in the District had been notified in writing.
- The Borough of Lansdowne - EIT - William Penn S D (239652), Pennsylvania EIT Tax, 42-045-1215185-EIT-239652, has been removed from the Engine, effective 1/8/2019. The tax was vetoed for the Jurisdiction.

  The Kingston, Borough of - EIT - Wyoming Valley West S D (409302), Pennsylvania EIT Tax, 42-079-1215395-EIT-409302, Rate has been updated to 2.175%, effective 1/1/2019. This was confirmed by Berkheimer who stated all employees and employers in the district had been notified in writing.

Rhode Island

- The Rhode Island State Unemployment Tax, 44-000-0000-ER_SUTA-000, Wage Base has been updated to $23,600, effective 1/1/2019.
- The Rhode Island Job Development Surcharge Tax, 44-000-0000-ER_SUTA_SC-030, Wage Base has been updated to $23,600, effective 1/1/2019.

- The Rhode Island Job Development Surcharge Tax, 44-000-0000-ER_SUTA_SC-030, Rate has been updated to .29%, effective 1/1/2019.

  The Rhode Island State Income Tax, 08-000-0000-SIT-000, Tax Tables have been updated, effective 1/1/2019.

Vermont

- The Vermont Catamount Healthcare Assessment Tax, 50-000-0000-ER_EHT-000, Rate has been updated to $168.10 per employee, effective 1/1/2019.

  The Vermont State Income Tax, 29-000-0000-SIT-000, Flat Supplemental Rate has been updated to 30% of Federal Income Tax Withholding, effective 1/1/2019.

Virgin Islands

- The Virgin Islands State Unemployment Tax, 78-000-0000-ER_SUTA-000, Wage Base has been updated to $26,500, effective 1/1/2019.

Wyoming

- The Wyoming Worker's Compensation - Employer Tax, 56-000-0000-ER_WC-000, Wage Base has been updated to $11,667.51, effective 1/1/2019.

GNIS Corrections

No GNIS Corrections were made in the **2019-R2** Tax Engine Release.

US Tax Table/Rate Corrections

Connecticut

- Set a Default Withholding of 6.99% with No Allowances for Connecticut State Income Tax, 09-000-0000-SIT-000, which is in accordance with the Connecticut Withholding Guide, which states that this withholding must occur if an Employee has not submitted the form.

Hawaii

- Refactored the Hawaii SDI Tax, 15-000-0000-SDI-000, to match the guidelines given by the State of Hawaii Disability Compensation Division on their website (http://labor.hawaii.gov/dcd/frequently-askedquestions/tdi/#My%20accounting%20service%20is%20withholding%20money%20from%20the%20employee%27s%20paychecks%20for%20state%20disability.%20How%20do%20I%20submit%20the%20state%20disability%20insurance%20tax%20payment%20to%20Hawaii?).

New Jersey

- Updated the New Jersey State Income Tax, 34-000-0000-SIT-000, withholding rate for income exceeding $5,000,000 annually has been decreased from 15.6% to 11.8%, effective 1/1/2019.

Ohio

- Disabled the Green LSD (7707), Ohio Tax, 39-000-0000-SCHL-7707, in the Engine. This School District is in Summit County and had been erroneously enabled along with the newly announced Green LSD (8503) in Wayne County was added to the Engine. The Green LSD (8503) Tax, 39-000-0000-SCHL-8503 is the active tax.
- Corrected an Issue with the Ohio Norton CSD Tax, 39-000-0000-SCHL-7711, where allowances claimed for the State of Ohio were being used in the calculation of the tax. This tax is to be levied on the Gross Wages earned by the Employee without consideration of Allowances.
- Corrected an Issue where the Jackson, Ohio City Tax, 39-000-1061427-000, was being returned when querying the Tax List with a payDate or System Date later than 11/24/2018. This will no longer be returned in the Tax List when the payDate or System Date are later than 11/24/2018.
- Corrected an issue with the Geneva Area CSD Tax in Ohio, 39-000-0000-SCHL-0404, where allowances claimed for the state of Ohio in the TOTALALLOWANCES parameter were being used in the calculation of the tax. This tax is to be levied on the Gross Wages earned by the employee without consideration of allowances.
- Corrected an issue with the Green LSD Tax in Ohio, 39-000-0000-SCHL-8503, where allowances claimed for the state of Ohio in the TOTALALLOWANCES parameter were being used in the calculation of the tax. This tax is to be levied on the Gross Wages earned by the employee without consideration of allowances.
- Corrected an issue with the James A. Garfield LSD Tax in Ohio, 39-000-0000-SCHL-6704, where allowances claimed for the state of Ohio in the TOTALALLOWANCES parameter were being used in the calculation of the tax. This tax is to be levied on the Gross Wages earned by the employee without consideration of allowances.
- Corrected an issue with the Madison-Plains LSD Tax in Ohio, 39-000-0000-SCHL-4904, where allowances claimed for the state of Ohio in the TOTALALLOWANCES parameter were being used in the calculation of the tax. This tax is to be levied on the Gross Wages earned by the employee without consideration of allowances.

  Corrected an issue with the St. Mary's CSD Tax in Ohio, 39-000-0000-SCHL-0604, where allowances claimed for the state of Ohio in the TOTALALLOWANCES parameter were being used in the calculation of the tax. This tax is to be levied on the Gross Wages earned by the employee without consideration of allowances.

Oregon

- Set a Default Withholding for the Oregon State Income Tax, 41-000-0000-SIT-000, for when no FILINGSTATUS or TOTALALLOWANCES have been set. This would be appropriate when the Employee has not submitted the Oregon Withholding Form OR-W-4, as no FILINGSTATUS and TOTALALLOWANCES would have been supplied by the Employee. The Default withholding will be Single with no Allowances.

Vermont

- Corrected an issue with the Vermont State Income Tax, 50-000-0000-SIT-000, where Vermont Tax was being calculated for Vermont residents where all wages were set in other states, even if the employer does not have Nexus in that state. The tax on those out of state wages will now only be calculated and returned if the employer has Nexus in the state.

  Corrected an issue with the Vermont State Income Tax, 50-000-0000-SIT-000, where Vermont Tax was not taking wages earned in other states into consideration when calculating tax on residents with wages earned in other states. The Vermont State Income Tax is calculated on the aggregated wages from all states in which wages are earned, and then an adjustment is made based on the percentage of work done in the non-resident states. The engine will now take all aggregated wages in all states into consideration when earned calculating Vermont State Income Tax.

Federal

- Corrected an Issue where the Employee and Employer Contributions to 457b plans were not being treated as Taxable Wages for Employer FICA, 00-000-0000-ER_FICA-000, and FICA, 00-000-0000-FICA-000. These contributions will now be treated as Taxable wages, as they have been prior to the 2018-R12 release of the Engine.
- Updated the Annual Contribution Limit for the Benefit Type Simple IRA to the 2019 amount of $13,000. The Employer Contribution, based on a percentage of the Compensation limit, remains the same.
- Corrected an Issue with Federal Income Tax, 00-000-0000-FIT-000, where Supplemental Wages were being withheld upon though the Employee has claimed Exempt. This has been corrected so that if an Employee claims Exempt, Supplemental wages will not be withheld upon unless the total ctd and ytd Supplemental Wages exceeds $1,000,000.
- Corrected an issue where FUTA was not being returned in a narrow set of circumstances when also calculating EIT and LST taxes in Pennsylvania.
- Corrected the Annual Contribution limits for 401k and 403b for 2019. These limits have been set to $280,000 as per the IRS. The Annual Contribution Limit for 457b has been removed as no evidence could be found for applying an Annual Limit.
- Corrected an issue that was introduced into the STE in the 2019-R3 release where no Gross, Subject or Gross Subject Wages were returned for State Income Taxes when an employee had claimed Exempt for the state tax. This has been reversed and now these wages will be returned, if applicable, even if the employee claims exempt. The Engine will continue to return zero for the tax for these State Income Taxes when Exempt is claimed.

State

Colorado

- Corrected an issue with Colorado State Income Tax, 08-000-0000-SIT-000, where Subject Wages were being returned on Residents working entirely out of state, though no tax was being calculated. Colorado does not require an Employer to withhold on Residents if all wages are earned outside of the state. Subject Wages will no longer be returned in these scenarios.

Kentucky

- Corrected the Kenton County OLF calculations so that the tax is levied properly at .7097% on the first $25,000, and then .1097% thereafter.
- Removed the Independence, Kentucky Employer OLF, 21-000-494900-ER_OLF-000, from the Engine. Initial feedback from the City stated this was to be calculated based on Employee wages, was determined to not be a withholding tax upon further research.

Michigan

- Corrected the Personal Exemption Amount for the Springfield, Michigan City Tax, 26-000-638622-CITY-000. The amount has been set at $750.

  For Missouri State Income Tax, 29-000-0000-SIT-000, the literal Dollar Amount entered will be withheld.

Missouri

- Corrected the Allowance Value for the Missouri State Income Tax, 29-000-0000-SIT-000, from the previous Value of $4,150 to $4,250, effective 1/1/2019.

New Jersey

- Corrected the 2019 Annual Tax Limit for New Jersey Employer SDI, 34-000-0000-SDI-000, to $172.00. This had incorrectly been listed as $16850, the limit for 2018.
- Corrected the 2019 Annual Tax Limit for New Jersey FLI, 34-000-0000-FLI-000, to $27.52. This had incorrectly been listed as $30.96.

New York

Corrected the behavior of Benefits Contributions for the New York Employer ECET Tax, 36-000-0000-ER_ECET-000, to match the treatment of Benefits Contributions of Medicare, per the State of New York.

North Dakota

- Corrected an issue in the North Dakota State Income Tax, 38-000-0000-SIT-000, Married Bracket from the additional amount of $710 to 710.60 to accurately reflect the amount published in the North Dakota Withholding Guide's table.

Oregon

- Corrected an issue with the Oregon State Income Tax, 41-000-0000-SIT-000, where an incorrect amount was being used for the phase out for the application of Federal Income Tax in the reduction of the Oregon Wages to arrive at the BASE in the formulas. This has been corrected and the appropriate limit/phase out amounts for Federal Income Tax for the various Tiers and Formulas are being applied.
- Updated the Oregon State Income Tax, 41-000-0000-SIT-000 Phase Out limit for the crediting of Federal Withholding Tax, which has been previously corrected from the amount incorrectly entered into the Engine as 66800 to 66680 in 2019-R1c. At the time the change was submitted, the amount published in the guide had been the corrected amount of $6,680 but was changed in a later publication to $6,800. This amount has updated in the Engine to match the listed $6,800.
- Corrected the Oregon State Income Tax, 41-000-0000-SIT-000, lowest threshold for the Phase Out for crediting Federal Income Tax withholding for Single filing status. This amount had been incorrectly entered as $3,450 and has been corrected to $3,550.
- Removed the Oregon Special Payroll Offset SUTA Surcharge, 41-000-0000-ER_SUTA_SC-060, from the Engine. Initial feedback from the State of Oregon stated this was related to withholding, however it was determined that this was not a withholding calculation, but an offset at the time of reporting.

Vermont

- Corrected an Issue where contributions made to 125 Benefits Plans were not being treated as tax deferred for the Vermont State Income Tax, 50-000-0000-SIT-000. These benefits will now be treated as Tax Deferred and Employee Contributions will reduce Subject Wages.

Washington

- Corrected an issue where wages set as Tips were reducing the Subject Wages passed as Regular and Supplemental Wages, for the Employer and Employee Washington PFML taxes, 53-000-0000-ER_FLI-000 and 53-000-0000-FLI-000. The State of Washington has stated that this tax is to be levied on all Unadjusted Gross wages, minus any tips. This has been corrected so that any wages set as Regular or Supplemental Wages will be used as Subject Wages in the calculation, but Tips will not.

Interface Changes

No Interface Changes were made in the **2019-R3** Tax Engine Release.

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